



Normfall Manager 4.0

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1

Overview

1 Overview

Welcome to Normfall Manager 4.0. By purchasing this program you have acquired an individual tool which supports information management for an array of sophisticated activities.

This manual provides you with information concerning all functions provided by Normfall Manager.

If you wish to obtain help concerning individual functions while working with Normfall Manager, move the mouse pointer to the corresponding buttons or respective commands and then press the function key F1. The corresponding help section will then open in the help window.



For further information on the help function, please refer to the section User Guide [152](#).

The structure of the manual

This manual is divided into the following main sections:

Preparation [12](#): Information required for using the software as well as the guide to getting started [20](#) (installation, activation, import of existing folder structures).

Introduction [29](#): Familiarization with the basic concepts of the software.

User Guide [49](#): A thematically structured presentation of the most important functions of the software.

Reference [124](#): A detailed explanation of the function of each command as well as the basic concepts involved in the use of the command.

User types

Computer novices: We recommend you to work through the tutorial [36](#) in the introduction as well as the basic principles of use [166](#) in the Reference section.

Power user: We recommend that you read the function overview [15](#) and skim over the introduction [29](#) including the tutorial [36](#). You should define which topics in the user guide [49](#) are interesting for you. You can experiment with the software and view topics from the Reference [124](#) section by invoking the context-sensitive help file concerning the selected menu commands by means of F1.

Administrators: the sections Functionality [15](#), Getting Started [20](#) and all sections from the User Guide [49](#) beginning with Special Folders [52](#).

Normfall Manager 3 users: Read the Improvements [18](#) section from the Function Overview in the chapter Preparation [12](#).

Undecided persons: In the sections Introduction¹², Function Overview¹⁵ and Information Management¹⁹ found in the chapter Preparation¹², you can find all required information on Normfall Manager.

2

Preparation

2 Preparation

2.1 Introduction

2.1.1 How Normfall Manager 4.0 Can Support You

Before beginning with the technical details, we want to explain what Normfall Manager 4.0 consists of and how you can put it to use.

Normfall Manager 4.0 is an IT tool perfectly adapted to the human working method that every individual applies when performing sophisticated tasks.

Normfall Manager 4.0 allows you

- to display complex subjects in the form of structures and
- to manage all kinds of files in a multidimensional manner.

Furthermore, Normfall Manager 4.0 offers you further functions such as the possibility to convert structures including comments into structured Word files and vice versa to convert Word files into structures; Normfall Manager thus makes it possible to create an individualized knowledge management system.

2.1.2 Adapted to the Human Working Method

What's your **usual working method** like when you are dealing with a **complex subject** – such as a court case, a scheduled publication, the management of a development project or team leadership?

Firstly, you get an **overview**. To do so, you study documents, hold conversations, edit notes, consider plans and figures, refer to literature, make phone calls, make visits and thus, familiarize yourself with the respective topic.

Shortly, you will recognize that the subject is associated with a series of **different categories**. Such categories concern, for example, people or facts or they can be legal, literary, technical, economic, aesthetic or other categories. You choose **names** for these categories, namely descriptive names for the purpose of fast orientation. For example, you could name these categories "Facts", "Persons", "Smith", "Defects in the construction", "Noise protection", "Meyer", "Burden of proof", "Plagiarism", "Threshold", "Events", "Legal status", "Dispute", "Aims", "Interests" or the like.

Generally, the categories are subsections of other broader categories. Thus, a **category hierarchy** is created. "Smith" is, for example, one of several "Experts" (the superior category) and this category has subcategories such as "Order", "Contract", "Content of Expert Opinion" etc. The "Experts" in turn belong to a group of persons which consists among other categories such as "Attorneys at Law", "System Analysts", "Witnesses", "Principal".

All categories of your subject are interconnected. "Categories" (elements) and "connections" (relations) result in a **structure**. At

the beginning, this structure is still very broad. In a legal case, for example, complexes of facts are distinguished from points of law. In the case of a publication, it is recommended to design a rudimentary structure of the intended work before expanding your writing in detail. In the case of a development project, it is recommended to define the as-is state and draft a target state. You permanently think about possible improvements to the structure.

In the course of being processed, the system created proves to be **dynamic**. New information is added, existing information proves to be unfounded, important information is still missing and must still be collected. Emails are exchanged, correspondence and phone calls yield new factors, things happen – in short, you are in a dynamic process.

In the course of further processing your subject, you change and refine your structure continuously. The **complexity** of the structure increases rapidly.

Furthermore: Again and again, you have to **interrupt** the work on your subject because you have to conclude other tasks. Later you have to continue the work on your subject. After weeks or even months, you have to regain an overview. Legal cases can, for example, last several years.

And things continue like this. Up to now, the foregoing occurs essentially in your head. There has hardly been any **tool** available which can effectively assist you in this task. Neither notes nor tabs are efficient. It is very difficult to process flipcharts and transparencies. The quantity of files increases and even the popular post-it is not efficient. This results in arduous searching efforts and duplication of work. Sometimes, it is easier to reprepare a certain topic, such as a point of law in a written document, rather than to search and find an already existing elaboration on the same topic. It is substantially necessary to count on your memory – however, the human memory's capacity is easily reached. Humans are intelligent and creative beings but not massive storage databases.

Therefore Normfall Manager proves to be useful. Normfall Manager does not want you to change your **working method**. In fact, Normfall Manager adapts itself to your pre-existing working method and assists you where up to now no help existed.

2.1.3 Structuring Complex Subjects with Normfall Manager

Normfall Manager has been specifically designed for the aforementioned situation and your **usual working method** in order to fundamentally improve your ability to process complex subjects. With Normfall Manager's aid you can create your structure on the screen and continuously revise it. In this way, things which have nearly been impossible to carry out on paper – namely to “play” with a structure, to move individual items within the hierarchy, to attach whole branches to other locations, to delete and/or paste sections, to edit comments, to copy, link, change or delete structure sections and much more– will be possible without any technical difficulties to disturb you.

Normfall Manager doesn't imply any subordination to technology. You are the master, Normfall Manager is the servant – namely a loyal servant who will always be at your service, who will never be exhausted, who will always be available, who will never be in a bad mood or ill and who will never abandon you.

There is **no** need to complete an extensive “**training**”. You can immediately use the core functions of Normfall Manager and you will intuitively understand the other functions in the course of your work.

2.1.4 Managing Extensive Quantities of Information

Besides the structuring of your subject, the Normfall structure also serves as a **key** by means of which you access quickly and specifically extensive quantities of information. Normfall Manager can even deal with hundreds or thousands of conventional office folders.

All digital **file types** (text files, e-mails, PDF files, Excel tables, PowerPoint presentations, audio and video files, internet pages, database contents...) can be managed using a **uniform user interface**. The use of Normfall Manager suppresses the annoying need to, for example, use a different filing system for text files than for e-mails.

All files, in particular text documents, can be attached in a **multidimensional** manner. Thus, Normfall Manager accommodates the fact that almost all text documents imply a multitude of uses. In order to accommodate each type of use in conventional document management, it would be necessary to create a copy of the document for each categorization that applies to that document, which would be completely impossible. In the Normfall information system, however, each document is saved only once and can be provided with any number of references to different structure nodes.

Your files, in particular your documents, can be attached to any number of structure nodes. This works with both whole documents and individual text passages - in short with all relevant information.

Specially-created **Normfall plug-ins** for all Microsoft Office Tools, PDF files and Internet pages facilitate the attachment process. A mouse click is sufficient to create an attachment.

The attachments can be done **such that they refer to a specific target**. If, for example, a relevant text passage is found on page 85 of a text document, it is possible to attach this document such that it later opens to page 85 by simply clicking on the reference to the document with the mouse.

Displaying files occurs **in a matter of seconds**, even when dealing with a very large number of files. This speed is critical for many applications. If, for example, you participate in a telephone conference during which a certain process is mentioned you can display this process on the screen from a large database even before your interlocutor has finished his sentence. Or, during a hearing of witnesses in the courtroom, you can immediately present a relevant document, even if you have not expected that

exactly this document could play a role.

It is possible to copy important sections of attached documents to the Normfall Manager interface. A **five-level information architecture** (name of the structure node, comments to the structure node, title in the reference row, comments to the reference row and the original document) guarantees that you always find the required information with ease and that you only have to focus on the original document and open it if this is absolutely necessary.

The whole **system architecture** is designed such that you are **informed** in a reliable and fast manner. Note that knowledge and time - next to your know-how - are your most important assets.

2.1.5 Creating a Knowledge Management System

Normfall Manager 4.0 allows you to create an individualized **Knowledge Management System**. You and/or your team will have long-term access to all the information created by yourself or resulting from research. Your structure serves as a key to this information.

This key can take any shape or form. For attorneys, for example, a clause of a law would be suitable.

2.1.6 For Whom Has Normfall Manager 4.0 Been Developed?

Originally, Normfall Manager was developed for lawyers. In many law firms, Normfall Manager has proved to be efficient and is characterized by high quality software engineering.

Meanwhile, it has been shown that Normfall Manager is a **universal tool** for any person who has to deal with complex information management in private or professional life.

Normfall Manager allows you to collect ideas, to structure thoughts, to create drafts, to realize creative brainstorming and much more. You can convert broad ideas into convincing strategies. You easily control complex subjects using Normfall Manager.

The application possibilities are diversified. You can schedule projects, draft publications, realize meetings, collect texts and much more. Normfall Manager supports your work with a legal case as well as in other activities which require the control of complex information.

Normfall Manager 4.0 is very convenient due to its user-friendly and attractive user interface.

2.2 Function Overview

Normfall Manager 4.0 allows you to create an index of contents (structure) for documents. It is possible to create document references and to edit text comments for each structure node. References can refer to targets within documents, e.g. a page number. Documents can be saved on the hard disc, in the Internet or on a supported DMS.

In addition, Normfall Manager 4.0 allows you to create structured documents out of a structure.

The user interface layout corresponds to the standard which is known from e-mail programs, having a structure on the left, a list (reference list) to each structure node on the top right, and a text editor for comments to each structure node and each reference at the bottom right.

2.2.1 Advantages

The structure of a Normfall project is similar to the creation of a folder structure. However:

- The structuring tools are substantially more comfortable and allow you to, for example, alter the order of structure nodes and to subordinate documents with respect to other documents (not only to folders).
- It is possible to comment each structure node, each document and each text passage. If a document or a text passage is attached to the structure several times, the comment always remains the same (this is known as the shared content feature).
- It is also possible to attach text passages in supported applications (e.g. Microsoft Office, Adobe Acrobat) to the structure.

In comparison to simple structuring tools:

- Normfall Manager is construed for very large quantities of documents. The project data can be saved on a database server such that any number of users can work with it simultaneously.
- Normfall Manager offers a full text search in the attached documents by means of Microsoft Indexing Search.

In comparison to Document Management Systems (DMS):

- Normfall Manager can easily be installed and maintained and it can operate in a completely decentralized manner based on project files. In this case, project folders are closed units which can easily be copied to other computers or storage media in order to use them there.

2.2.2 Functionality

The data of a project (structure, references, texts) is saved in a project folder or on a database server. The folder in which the project file is located is considered as the project folder. The references are saved as relative pathways to this folder such that the project folder is "closed" and able to be "transported". Thus, it is impossible to include references to documents outside the project folder, unless they can be accessed by means of a URL or a supported DMS.

Normfall Manager 4.0 has been developed on the .NET platform.

2.2.3 Highlights

- References to text passages (currently supported applications: Adobe Acrobat, Microsoft Office).
- Comfortable attaching of PDF files using integrated Normfall PDF Editor.
- Plug-ins (Adobe Acrobat, Microsoft Office, Internet Explorer, Windows Explorer) allow for quick attachments and automatic copying of files to the project folder. Also recently opened documents from the Recent Docs (System) can be attached (this is optional). By simply placing a checkmark you can attach to several structure nodes simultaneously.
- Simple document import/export by pulling the mouse or copying/pasting in Windows Explorer and Outlook.
- Simple management of attached documents (print, copy, zip, send).
- Comfortable structuring tools which allow you to establish references between structure nodes, show partial structures at several locations and synchronize contents between structure nodes.
- References to structure nodes between different structures (projects) are possible.
- Hyperlinks from the running text in other applications (e.g. e-mail) to structure nodes are possible.
- Full text search in the project data and, by means of the Microsoft Indexing Service, even in attached documents.
- Individual design possibilities for structure nodes by assigning user-defined icons and using colored nodes.
- Standard Options settings for user groups by means of Normfall Manager Administration Kit.

Authors

- Convert commented structures into structured texts, convert structured texts into commented structures.
- Editor with extensive formatting options.

Organisation

- Support of the division of work by the Inbox Folder in which files are saved for the purpose of being attached.
- Possibility of closed project folders which contain all project data and documents and can easily be transferred to other storage media and computers. In addition, source references can maintain the connection to a central DMS.
- Simple installation, management and operation, attractive user interface, extensive documentation.
- Very robust, even in case of extremely large databases and multiple access if the project is saved on a database server.
- Future support by an own Web Client (Read-Only).

- Simple import of existing folder structures.

Legal Application

- Automatic attachment of documents resulting from research within the Juris database.

2.2.4 Improvements

This section provides information for users of Normfall Manager Version 3 ("NF3") or an older version. Please take note of the section "Important Changes" at the end.

- New optically attractive user interface.
- Built-in and custom icons for defining structure node types.
- Plug-ins (Adobe Acrobat, Microsoft Office, Internet Explorer, Windows Explorer) simplify the attaching process.
- Automatic copying of documents to the project folder when attaching references.
- Quick attaching from Recent Docs (System) of the recently opened documents.
- Quick attaching from File Inbox Folder (supports division of work).
- Fast actuating of Normfall projects by means of the "Normfall Button" in hover mode which remains permanently visible on the screen (optional).
- Multiple references: refer to several structure nodes simultaneously by placing checks appropriately in the "Attach Box".
- Multiple selection: several structure nodes can be selected simultaneously.
- Convert structure nodes into reference rows and vice versa.
- Shared Content Locations: the contents of several structure nodes or reference rows are automatically synchronized.
- Shortcut: By creating a shortcut to a structure node its branch (partial structure) will be shown at another location.
- Hyperlinks in the structure: references to structure nodes in other structures (projects) are possible.
- Hyperlinks from the running text: references to structure nodes in other applications (e.g. Email) are possible.
- Improved formatting options in Editor.
- Pulling of documents by means of the mouse, copying and pasting: Each direction is possible (to/from Windows Explorer and Outlook).
- Management functions for documents: export, zip, print, send, delete completely.
- Integrated representation of the project folder.

- Improved search function: search in attached documents by means of Microsoft Indexing Service, search in partial structure and date search.
- Support of a database server: robust performance when dealing with large databases and multiple user access.
- For System Administrators: Possibility of defining standard options settings for user groups by means of the Normfall Manager Administration Kit.

Important Changes

- Renaming: in NF4, the document folder is called the Project Folder; the structure file is called the Project File.
- System requirements: please refer to the amended System Requirements²⁰.
- Index function deleted.
- Initially, an updatable author structure is not possible.

2.3 Normfall Information Management

Using Normfall Manager you can manage information in the form of documents and files in an efficient manner.

A prerequisite to managing information with Normfall Manager is that all documents (a few examples would be text documents, figures, photos, freehand sketches, drawings, dictations, etc.) are available **in digital form**.

You don't need to worry about memory capacity. Modern PCs and notebooks have hard discs with sufficient space for several thousand office folders. Thus, it is possible to copy all processes including all folders into your notebook and to keep your notebook at your side, you can even open any desired document at any place in a matter of seconds by means of a simple mouse click.

In this section we will show you how you too can reach this goal.

2.3.1 Digital Files and Databases

You already have access to many documents, for instance, Word documents, e-mails or Excel tables in **digital form**. You can easily handle and manage these files with the help of Normfall Manager.

You can also save databank files (e.g. Access, dBase) as PDF files, which can then be managed by Normfall Manager without any problems.

2.3.2 Paper Documents

Paper documents, such as incoming written material, can be taken up using a scanner to create so-called PDF files.

The abbreviation PDF stands for **P**ortable **D**ocument **F**ormat and was developed by Adobe Systems. With this versatile file format

you can capture documents (fonts, formatting, colors and graphics), regardless of which program and operating system was used to create the document, almost as a photographic copy of the original. PDF is well-known throughout the world in the Internet and is nowadays considered as the industrial standard for electronic document distribution.

Thereto, a corresponding software is required. The most important software for creating and editing PDF files is the commercial program package Adobe Acrobat. You should not confuse this program with Adobe Reader, which is available free of charge in the Internet and allows you only to view and print PDF files. For the full version of Acrobat (beginning with Version 7), Normfall Manager offers a special Plug-in for Attaching Documents .

Scanning

In case you would like to scan your documents yourself, it is recommended to use modern scanners which operate fast and can handle several pages of input simultaneously. If your employees scan all incoming mail and other documents daily, you can realize the paper-free office with minimal additional effort. The advantages thereof by far outweigh the effort put into it.

There are also companies that will scan documents for you on site. This option is helpful when you have to process large volumes of documents, maybe even in a distant city.

Optical Character Recognition

You can also use character recognition with suitable documents (particularly with laser prints) while using PDF files. There are several advantages associated with OCR. It allows you to, for example, search for given terms in the document.

It also allows you to copy important text passages to the text editor (comment editor) of Normfall Manager. From there you can copy the citations directly to your written documents (e.g. Word documents) without having to open the original document again.

You can also use character recognition at any time after creating the PDF document. In Adobe Acrobat this can be done by using the commands "Document" and "OCR Text Recognition".

2.4 Getting Started

2.4.1 System Requirements

In order to use Normfall Manager, one of the following operating systems as well as a computer with performance capabilities corresponding to the given operating system are required: Windows XP / Vista / Windows 7. In addition, Microsoft Internet Explorer 7.0 must be installed on your computer.

2.4.2 Installation Process and Update

You can install Normfall Manager 4 from the Internet^[21] or from a CD^[22]. Therefore, it is required to install the component ".NET 2.0 platform^[24]" from Microsoft which is pre-installed in Windows Vista.

The section "Installation^[22]" provides information about the installation procedure.

The section "Updating Normfall Manager 3^[22]" informs users of Normfall Manager 3 on how to proceed.

The section "Current Updates^[23]" describes how you can obtain Normfall Manager 4 updates from the Internet, which correct errors and/or contain additional features for free.

The section "Deinstallation^[23]" describes how to remove the software from your computer.

The section "Further Required Components^[24]" contains information on the software components of your computer on which Normfall Manager depends and which you have to install.

Downloading from the Internet

In the Internet, you can always find the latest version of the software that you can use with your license. You can find further information on our web page www.normfall.com.

In the download section of the web page, you will find the installation package for Normfall Manager 4. Right click^[174] on the corresponding link or the **http** or **ftp** button (FTP is generally more reliable) and select the command **Save as...** in order to save the file on your computer.

*Most Internet browsers show **warnings** in order to prevent users from opening files from an unknown source. Since the file is directly downloaded from the site of your producer in this case, this warning is not relevant.*



The downloaded file (ManagerSetup x.xx.xxx.exe) is the installation package for Normfall Manager. It contains the complete software which, however, still has to be installed on your computer before you can use it.

Start the installation^[22] by opening the installation package (e.g. by double clicking^[173]).

The installation packages of Normfall Manager can be used for updates in order to update an existing installation. The procedure remains the same.

Always keep installation packages saved on your computer. If an update contains an error you can return easily to the previously installed version if you have it available on your computer.



In order to return to an older version, first deinstall^[23] the current version and install the older version.

Installation of the .NET 2.0 Framework

If during the installation you are requested to install the .NET Framework, download it directly from Microsoft or our web page and execute the downloaded software in the same way that you installed the Normfall Manager installation package.

For further information, please refer to Further Required Components^[24].

Installing from a CD

Insert the CD into your CD ROM drive. If the CD does not automatically start, double click on the CD icon^[169] found under My Computer.

Follow the instructions in order to start the installation^[22] of Normfall Manager.

The software cannot be used before the installation process is completed; during the installation process any necessary further required components^[24] are also installed.

Installation

The installation procedure is executed by opening the installation package^[21] or starting the installation from a CD^[22]. To do so, administrator rights are required.

Normfall Manager 4 is then available to all users of the computer.

During the installation process, you can select an application structure and select which plug-ins^[62] should be installed (see: plug-in installer^[139]).

If the installation procedure stops, minimize all open windows and move the installation window to check whether a dialog box is waiting to be completed behind the installation window.



Updating Normfall Manager 3

When installing Normfall Manager 4, older versions are not automatically deinstalled. However, you can do this manually in order to save memory capacity. To do so, please proceed as follows:

First, close all programs. Then, open the Normfall Manager folder by means of the programs folder found in the Windows Start menu and execute the command **Remove or Repare Normfall Software**.

Existing Normfall project files are not affected by this procedure. They remain available for use with the newer version 4.0. Older project files that are opened in Normfall Manager will automatically be converted. Converted files, however, cannot be opened in older versions of the software.

Current Updates

We are continuously developing and improving Normfall Manager 4.0. On our web page we provide you with the current version (the most recent "build") of Normfall Manager. At any moment, it is possible to update your version of Normfall Manager 4.0 by installing the newest version in a similar manner to the downloading process. To do so, it is **not** necessary to deinstall the previous version. In the event of an update, your Normfall project files and your license data remain untouched.

If you wish to know the build number of your Normfall Manager, execute the command **Info on Software** found in the help menu. In the window that appears you will find the **Installed Version** in the form of a sequence of numbers (e.g. 4.03.0141); the last part of this sequence corresponds to the build number (for example 141). If you find a higher build number on our web page an update is recommended.

It is also possible to execute this check automatically by means of the command **Check for Update** ^[153] in the help menu.

Tip: Use the command **Check for Update** ^[153] in order to search for updates for free which you can immediately download and install.



Rarely, an update can contain an error. Then, it may be necessary to return to a previous version of the software. In this exceptional case, it is necessary to manually deinstall ^[23] the higher version before reinstalling the previous version.

Notice: Always keep downloaded installation packages. If you wish to remove an update you need the installation package of the previous version.



Deinstallation

At any time, you can remove Normfall Manager 4 from your computer. To do so, two options are available:

Deinstallation by means of the start menu (recommended)

Select in the Windows start menu the command ^[167] **Programs | Normfall Manager 4 | Deinstall**.

Deinstallation by means of the control panel

Select the Control Panel from the Windows start menu and then Add/Remove Programs (under Windows Vista: Programs and Features). Select Normfall Manager 4 in the list and click on the deinstallation button.

Remaining data

Generally, all created projects, user settings and license information remain after the deinstallation process such that it is

possible to continue to use the software in case of a reinstallation.

Experienced users can remove the software completely by deleting the folder %Appdata%\Normfall as well as the registration key Software\Normfall\Manager\4.0 from the user profiles. Due to the very small quantity of data, this step is normally not required.

Due to the distribution of user profiles in organizations with Windows Server, it is not recommended to remove this data yourself.

Further Required Components

.NET Framework 2.0 or higher

The .NET Framework from Microsoft is an environment for executing programs using a virtual machine (a concept introduced by Java). Windows Vista and Windows 7 include it directly out of the package; Windows XP, however, does not.

Normfall Manager 4 requires the .NET Framework version 2.0 or higher. Whether future versions will also be compatible, is not certain at the time of the creation of this manual.

If no .NET Framework has already been installed on your computer, the installation procedure of Normfall Manager^[22] will request its installation. It is possible to directly download the desired language version of the installation package of the .NET Framework.

Jet and MDAC

The databased database Management System (DBMS) Jet 4.0 and Microsoft Data Access Components MDAC are already included with all supported Windows versions. Check that you have the latest Service Pack for your Windows version installed so that you also have the latest versions of Jet and MDAC.

It is rare but possible that such components are damaged, e.g. due to improper installation procedures of Third-Party Software, such that Normfall Manager doesn't function properly. At the time of the creation of this manual, it is easy to find information on repairing a damaged MDAC on the Internet.

2.4.3 Activating your License

When you log in on a computer on which Normfall Manager 4 has been installed, you can activate your license when starting the software for the first time. That means, the license that you or your company have/has purchased, that is, the 30-Day-Demo license for free (included) or the Basic license which is also free and allows you to use the software without any temporary restriction but with limited functionality.

Detailed activating procedure

After successfully installing Normfall Manager, the Normfall Icon^[169] named Normfall Manager 4.0 can be found on your desktop

(the area of your screen behind windows applications).

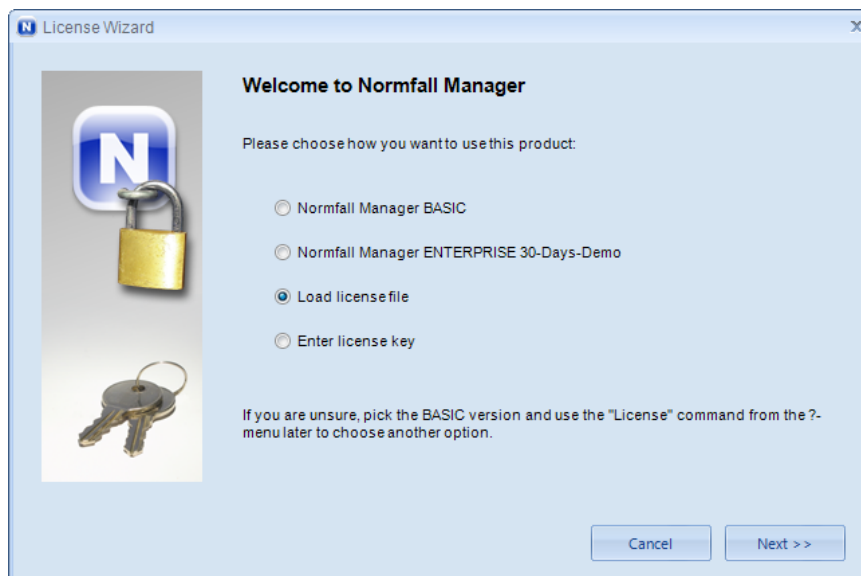


Normfall Manager 4.0

Furthermore, you will find a folder called Normfall Manager 4.0 in the folder **Programs** of your Windows start menu.

You can start Normfall Manager by double clicking on the icon or the corresponding entry in your Windows start menu. Alternatively, you can also open the corresponding context menu by right clicking and selecting the command **Open**.

After starting Normfall Manager, the license wizard will open which assists you in activating your product:



Select one of the following options and click on **Next**:

Normfall Manager BASIC

Generally, you can use Normfall Manager as the Basic Edition. Please note the limited functionality of this version of the software.

Normfall Manager ENTERPRISE 30-Days-Demo

This option allows you to test the Enterprise Edition for free with its entire functionality for a time period of 30 days.

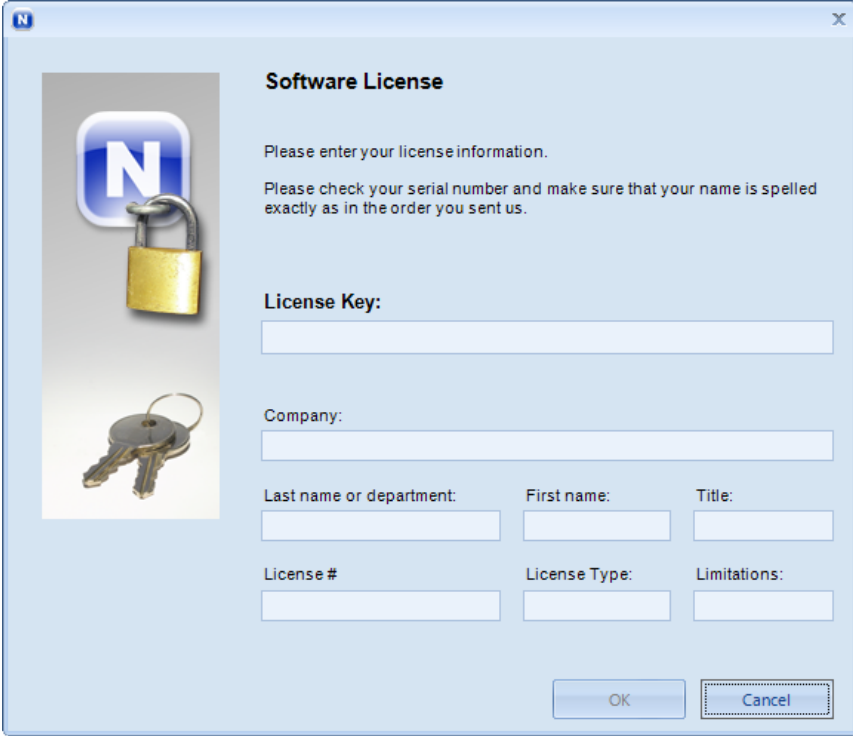
Load license file

If you have received your license file (file extension ".nl4") by e-mail, we recommend you to save it to your file system. For the purpose of activating Normfall Manager with this license file, select this option and click on **Next**. The file list box will now open where you can select the license file.

Alternatively, you can also activate Normfall Manager by double clicking on the license file.

Enter license key

If your license file is no longer available to you and if you have the detailed license information, you can also activate Normfall Manager manually using this option. The following dialog box will open:

The image shows a Windows-style dialog box titled "Software License". On the left side, there is a vertical panel containing a blue square icon with a white letter 'N' and a yellow padlock, and below it, a set of keys. The main area of the dialog box has a light blue background. It contains the following text and fields: "Please enter your license information." followed by "Please check your serial number and make sure that your name is spelled exactly as in the order you sent us." Below this is a label "License Key:" followed by a single-line text input field. Then a label "Company:" followed by a single-line text input field. Below that are three labels: "Last name or department:", "First name:", and "Title:", each followed by a single-line text input field. Then three labels: "License #", "License Type:", and "Limitations:", each followed by a single-line text input field. At the bottom right, there are two buttons: "OK" and "Cancel".

Enter the required license information and confirm your entries by clicking on **OK**.

2.4.4 Importing Existing Folder Structures

If you already have folder structures in which you manage your documents you can convert the folder structures to Normfall structures.

The folder structure itself will not be changed but rather a new structure is created; the structure nodes of this new structure correspond to the existing folders and the reference rows refer to the documents found in the folders. In principle, you obtain a true copy of the folder structure but from now on you can use the possibilities provided by Normfall Manager.

First of all, you should determine on which level the conversion should occur. If, for example, you have a folder structure containing clients and projects, whereas several project folders are contained in one client folder, it should be determined whether to create a Normfall structure for each client or each project.

It is supposed that the project is the correct element to focus on

for the creation of your new structure, but finally this decision is left to your discretion. If there are a lot of cross references and shared documents between the projects of a client, we recommend you to create the Normfall structure on the level of the client. However, you will no longer have the option of copying a folder containing a client project including its Normfall project file, e.g. for the purpose of a presentation on a memory stick; you will have to select at least the entire client folder.

It is not required to convert all folder structures immediately. You can wait until you want to work with the given structure.

Please follow the instructions in the section New from Folder Structure  to execute a conversion.

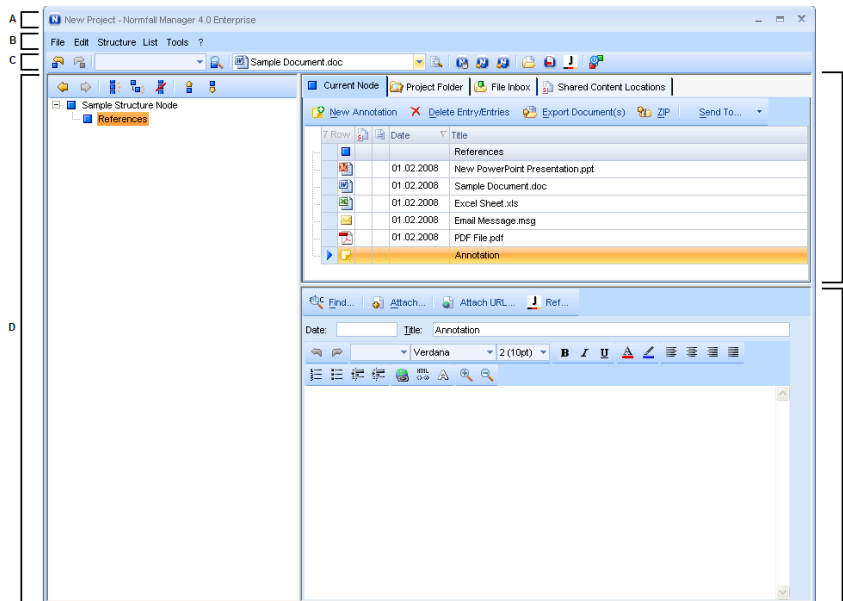
3

Introduction

3 Introduction

3.1 The Structure of the Application Window

The following figure shows the application window (the user interface, the main window, the Normfall window) of Normfall Manager with an open project^[35] the name of which can be found next to the Normfall icon in the title bar. For further explanations concerning the individual elements view below.



Title bar of the window (A)

Menu bar (main menu) (B)

In the main menu^[169] you will find the menus of Normfall Manager (**File**, **Edit**, **Structure**, etc.). Clicking on a menu will open it. For details on the menu commands please refer to the chapter Functions Overview^[124].

(Main) Toolbar (C)

The toolbar^[172] contains icons^[169] and edit boxes which allow you to execute certain commands^[167] by simply clicking with the mouse. To see which command will be executed by a given icon, you can move your mouse over an icon, which will call up a short explanation of the command (known as a "tooltip").

Structure view (D)

The structure view^[30] represents the structure, thus the central key of your project.

List view (E)

The list view^[30] represents lists of documents and positions in documents attached to the structure.

Detail view (F)

The detail view^[34] shows information and comment texts concerning structure nodes or attached documents or respectively positions in documents.

It is possible to modify the size of structure, list and detail views by means of the separators^[171].

3.1.1 Structure View

The structure view is the left portion of the application window (fig.)^[29] of Normfall Manager.

Within the structure view, you create and edit the Normfall structure, which represents the systematic key to any digitally saved information. This view can be scrolled^[171] such that your structure can adopt any size.

3.1.2 List View

The list view is the right top portion of the application window (fig.)^[29] of Normfall Manager.

The list view represents the content of your project. A toolbar including commands for said view is on the upper edge. It lists all reference rows of the files you have attached thereto as well as comment rows concerning the respective structure node marked in the structure view.

Above the toolbar, it is possible to show different tabs representing different window contents once you click on them. For further information please refer to the chapter tabs in the List View^[30].

Tabs in the List View

The list view

Generally, information and different folder contents will be represented in the form of tables in the list view. The folder contents are represented by the individual tabs that will be explained in the following section.

You can sort the individual lists by ascending or descending order according to **date** or **title** by clicking on the corresponding heading of the column. By clicking on a **tab** you can switch between the contents of the individual lists.

Depending on which tab is currently active, different commands are available on the buttons of the toolbar - for further information thereto please refer to the chapters concerning **Functions in the List Menu**^[134] and special commands in the List View^[155].

The tabs

In the **List** menu you can choose the individual tabs (each of which contains different content) will be shown under **View**. The View menu can also be called up in the context menu of the list view. You can remove a tab by double clicking on the appropriate icon. By default the tab **Current Node** will be shown. By right clicking on the bar containing the tabs the **View** menu is shown. The shown tabs will have a colored background.

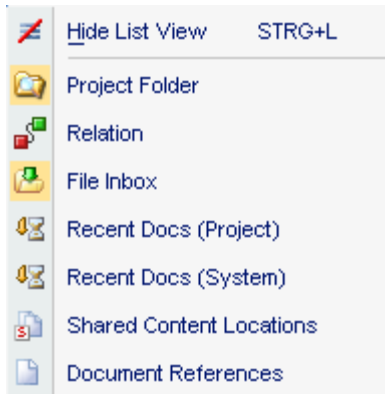


Fig.: The View menu with colored backgrounds behind all currently displayed tabs: Project Folder and File Inbox.

Current Node



The tab **Current Node**, which is shown by default, lists all reference rows belonging to the structure node that is currently marked in the structure view to the left. A toolbar with commands followed by a table of all reference and comment rows, in the first row of which the structure node itself is shown (which is distinguished by a colored background) follows. Then, all references are listed.

In the first column of the table, icons represent the various file types.

The next column shows the following icon: 

This icon shows whether or not the reference is a so-called shared content location⁹⁷.

In the third column, the  icon shows, whether or not the attached document opens to a specific target. For further information about how to attach documents that open to a specific target please refer to the chapter Plug-ins for Attaching Documents⁶². The last two columns contain the date as well as the title of the document. In the date column you can manually enter the date into the given row using the numeric keypad. The symbol used to separate days, months and years (by default "." or "/", depending on the regional settings of your computer) does not have to be entered.

Project folder



Under this tab the content of your project folder is shown. Thus, you can directly access to the project folder and move files from Windows Explorer directly to the project folder using, for example, drag & drop⁹¹ without having to navigate to the project

folder in Explorer. Provided that your project folder contains several nested subfolders, it is possible to open the superior register by clicking on **Upwards**. Further details concerning the project folder can be found in the section called project folder^[36].

Relation

When activating the Relation Module, the tab **Relation** is additionally shown. More information on this function can be found in the section The Relation Tab^[117] within the chapter The Relation Module^[114].



Relation

File Inbox

Under the tab **File Inbox** all documents are listed that are currently in the file inbox. Further information can be found in the section File^[54]Inbox^[54] of the chapter Folders^[142].



File Inbox

Recent Docs (Project)

The tab **Recent Docs (Project)** lists all files that have recently been used (e.g. opened) in the current project.



Recent Docs (Project)

Recent Docs (System)

The window content of the tab **Recent Docs (System)** lists all files that have recently been used on your computer, independently of Normfall Manager.



Recent Docs (System)

Shared Content Locations

This tab provides information about the number and location of shared content locations of an attached file or structure node. The content always refers to the element that is currently selected in the list view. Alternatively, it is possible to obtain this information by double clicking on the shared content locations icon.

For further information concerning this command, please refer to the chapter **Show Shared Content Locations**^[103].



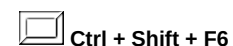
Shared Content Locations

Document References

To determine to which structure node a document is attached, select it and then select the **Document References** tab from the **List | View** menu. Alternatively, you can use the key combination **Ctrl + Shift + F6**.



Document References



Ctrl + Shift + F6

If this tab was shown using the key combination, this will not be made evident in the View menu.



New Search

The **New Search** tab is open when you want to search your project or attached documents for certain terms. Details on the search function can be found in the chapter Searching and Finding¹⁰¹

Sorting Lists

The entries of the lists in the list view can be sorted in ascending or descending order according to date or alphabetically according to title. To do so, simply click on the heading of the column in which you would like to sort the list. Clicking again allows for switching between ascending and descending order.

To sort according to several criteria, e.g. according to date and within this sort also by title, first click on the column *Date*, then press the **Shift** key and click on the column *Title*. Whether the list is currently being sorted by ascending or descending order is made visible by the small arrows in the heading of the column.

To completely deactivate the sort function you may click on the left upper edge of the table where the total number of entries is displayed.

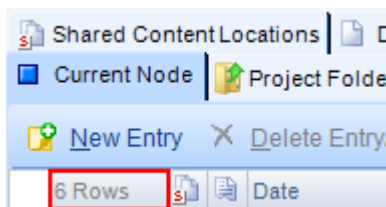


Fig.: Deactivating the sort function

Selecting Several Reference Rows or Structure Nodes

You can select several reference rows at the same time by pressing and holding the **Ctrl** key and clicking on the grey square on the beginning of the row of the corresponding row with the mouse.

The row selection field, which can be recognized by the blue arrow at the beginning of the row , always marks the currently selected row.

Accordingly, you can select several structure nodes. Press and hold the **Ctrl** key and click on the desired structure nodes. Please note that only structure nodes found on the same level can be selected at the same time.

Alternatively, after having selected the first reference row (or respectively the first structure node), it is possible to press the **Shift** key and click on a reference row (structure node) located several rows (structure nodes) below or above the first reference row (structure node) in order to select a continuous group of rows (structure nodes).

Selecting several rows simultaneously allows you to copy, move or delete entire blocks of reference rows. This option is particularly useful because a reference to several structure nodes enables multi-dimensional access to documents. Thus, the

chances to find important documents, if required, quickly, are increased.

Showing and Hiding the List View

The list view can be completely hidden. This setting is user and project specific and is particularly advantageous when working with text heavy projects because hiding the list view considerably increases the size of the text editor, which allows large text passages to be displayed more comfortably.



To hide the list, please use the menu **List | View | Hide List View**. Alternatively, you can use the command found in the context menu of the list view.

Hiding the list view by default

Under **File | Properties** the option for hiding the list view is activated by default. However, it is possible to change this setting at any time.

Under **Tools | Options | New Projects**, it is possible to determine whether the list view should be hidden by default for **new projects**.

*In the Basic Version of Normfall Manager 4.0 the option **Hiding the list view** is activated by default, which means that new projects will be shown with the list view hidden.*



3.1.3 Detail View

The detail view is the bottom right area of the application window (fig.)^[29] of Normfall Manager.

Here, you can find comments on the currently activated structure node on the left. You can directly edit comments or copy them from saved documents or from the notes made to the text editors of other nodes. You can directly copy text passages from these notes, for example quotations, to your written documents.

It is also possible to scroll the content of this view such that the dimension of the content is not restricted in any manner. Furthermore, it is possible to reduce or enlarge the size of the comment text by means of the zoom functions^[88]. Beneath the toolbar^[172] you find a data and title row followed by another toolbar which contains commands for formatting text. The text editor itself, which contains further Editor^[88] functions, can be found below. On the right edge of the window, a Button^[166] with a yellow plus sign is shown next to the title Field^[172]. Clicking on this plus will show another row which indicates the exact path of the file in the **File** field. In case of a Word or PDF document attached in order to open to a specific target the field **Pos.** will indicate the page or bookmark which was defined when attaching the file. For further information on this topic, please refer to the chapter Saving and Attaching Files^[57].

If the text displayed in the text editor is an original excerpt from an email, Word document or PDF file (if attached by means of Normfall PDF Editor), the text editor (grey shaded in this case) is locked for editing and solely highlighting passages is possible by clicking on the **Highlight** button. Yet, by using the **Change to Comment** button the text editor is unlocked so that you can add your own annotations.

3.2 The Basic Concepts of the Normfall Software

3.2.1 Normfall Manager 4.0

Normfall Manager 4.0 is the program that you are currently using. It allows you to create structures, manage files and link directly to the contents thereof.

3.2.2 The Project

The project is the totality of data which you can display and edit in a Normfall application window and save within one file or on the database server.

A project consists (always) of a structure^[35] as well as (usually) references^[36] to the attached files (Word, PDF, e-mails, etc.).

When creating a new project a project file will be created by Normfall Manager (recognizable in your file system by the file ending .nf4), which you manage in a subfolder of your Normfall project folder^[36]. The project file carries the same name as the project folder that it belongs to (e.g. "Construction Project Smith").

3.2.3 The Structure

The structure is the key with which you can master complex subjects and navigate through large quantities of data in a matter of seconds. The structure nodes form together with all sub nodes partial structures which are also called branches.

A structure node is an element of the Normfall structure. You can name a structure node using a word or word combination. It is also possible to mark structure nodes with your own icons or with different colors. For more details please refer to Defining Node Types^[99].

By clicking on a structure node, its references and comment rows will be shown in the list view.

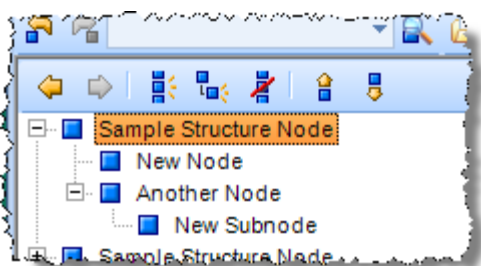


Fig.: Structure nodes with subnodes

Refer also to [structure view](#)^[30].

3.2.4 Reference List

The Reference List shows for each structure node the documents and document passages "attached" thereto.

The list entries are called [reference rows](#).

For each reference row, date, title and comments can be recognized.

It is also possible that reference rows are **empty** and thus are mere comment rows where you can add notices **without** referring to a document.

A [reference which opens to a specific target](#) is a reference which does not only refer to a whole document, which rather refers to a certain passage such that the site is shown immediately after the opening of the document.

See also: List view^[30], tab [structure node](#)^[30].

3.2.5 The Project Folder

The [project folder](#) for a given Normfall project is the folder in your file system that contains all documents that are attached to said project.

If you are not working with a database server, the project folder will also contain the project file in which all data of the project (i.e. the structure, reference rows and comments) are saved.

Further details can be found in the project folder^[52] section of the chapter Special Folders^[52].

3.2.6 The Root Folder

The [root folder](#) (also: project root folder) is the folder in your file system that contains the project folders of all projects that you are managing with Normfall Manager.

We recommend naming this folder for example "Normfall Projects" and creating a project folder for each project with a corresponding name (e.g. "Construction Project Smith", "Contract of Sale Populator Inc." or "Trial Johnson vs. Jones").

Further details can be found in the project folder^[36] section of the chapter Special Folders^[52].

3.3 Tutorial

In the following chapters, you will familiarize yourself with the basic functions of Normfall Manager. Subsequently you will be able to create projects, edit structures and put complex structures to use in an optimal and efficient manner.

Normfall Manager provides you with several ways to execute a command^[167]. The Tutorial is limited to the presentation of the most important options. For the purpose of a more global overview of all commands, please read the corresponding chapters under Command Overview^[124].

3.3.1 Creating a New Project

This chapter shows you how to create a new project by means of the corresponding command found in the file menu and what you should take into consideration when doing so. For further information on creating a new project e. g. by converting a structured Word document^[81] or an existing folder structure^[50] please refer to chapter Creating New Projects^[49] found in the User Guide.

1. Start Normfall Manager by double clicking on the program icon on your desktop.

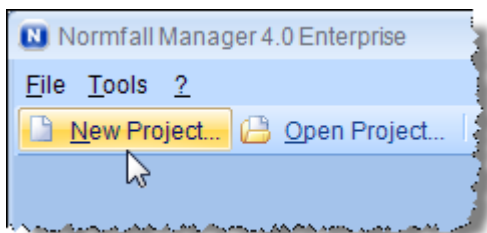


Normfall Manager 4.0

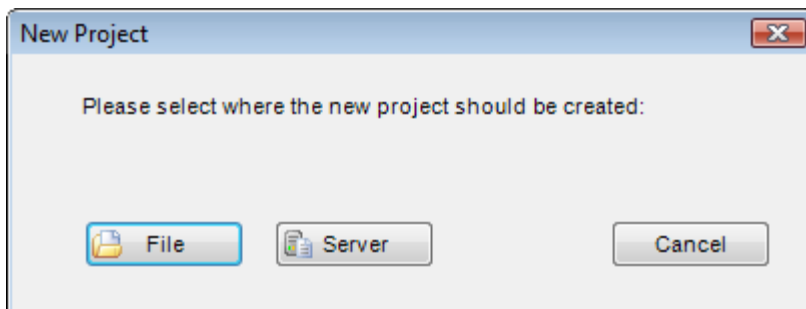
2. Select the command^[167] **New** from the **File Menu**^[169] or click on **New Project** in the toolbar^[172].



Alternatively, use the key combination^[174] **Ctrl + n**.



If there is a database server installed on your system, the following dialog box will open:



3. Select where the new project should be created: in your file system or on a database server.

If there is **no** database server installed, the dialog box shown above will not appear and you can go on with step number 4.

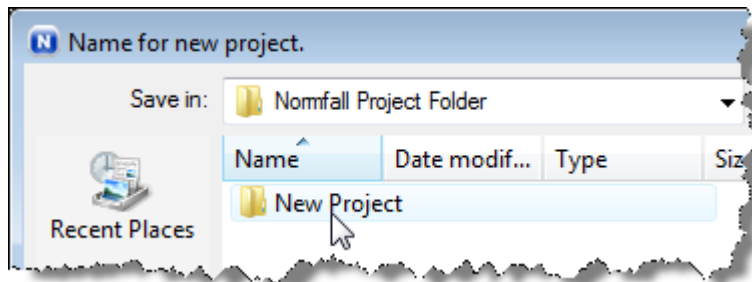
In our example we assume creating a new project file in the file system. More information on database servers can be found in the chapter Working with a Database Server^[112].

4. If necessary, create a folder in which you collect all Normfall projects.

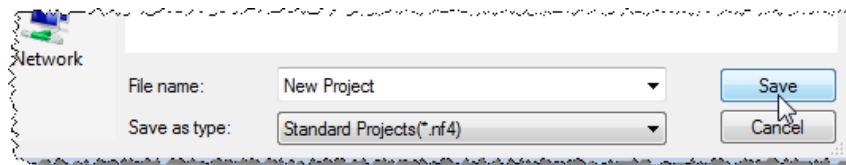
In our example, this folder is called "Normfall Project Folder".

5. Create a subfolder for the current project (here: "New Project").

6. Open the newly created subfolder.

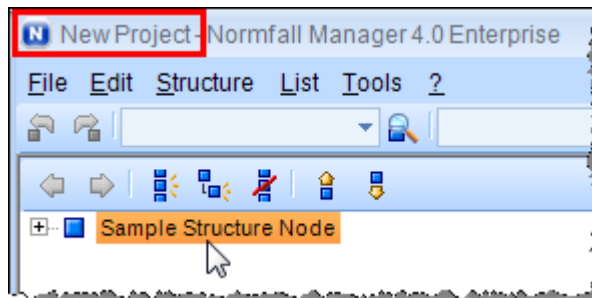


7. Give the project file a name and then click on **Save**.



A prompt will be displayed which asks you to determine whether the new project should be saved within a project folder of the same name to be automatically created. As you already have created a project folder as described under number 5 you should answer the question by clicking on **No**.

Normfall Manager will open with your newly created project. The title bar of the program shows the project name.



The white area on the left (called the structure view) contains the first structure node which is automatically created by Normfall Manager and named "Sample Structure Node". Clicking on the plus sign to the left of the node will display existing subnodes. The further structure can now be built based on this first structure node. Further details concerning the structure of the application window^[29] can be found in the corresponding chapter.

In the following chapter of the Tutorial, you learn more about the functions for Creating and Designing the Structure^[39].

3.3.2 Creating and Designing the Structure

Normfall Manager is a tool which assists you in structuring any type of information in a useful manner.

Deciding how to structure your information is entirely at your discretion and due to the various functions of the software, you are always able to change the structure and adapt it to new developments.

The structure corresponds to a content index or an organization. Each structure node represents an organization element. For the purpose of, e.g. organizing information in the categories "Persons", "Expert opinion", "Procedure" etc., create structure nodes with these names in Normfall Manager.

The relevant commands for this purpose can be found in the **Structure** menu^[169]. The most important functions for creating and designing the structure can also be found in the toolbar^[172] directly located above the structure view^[30].

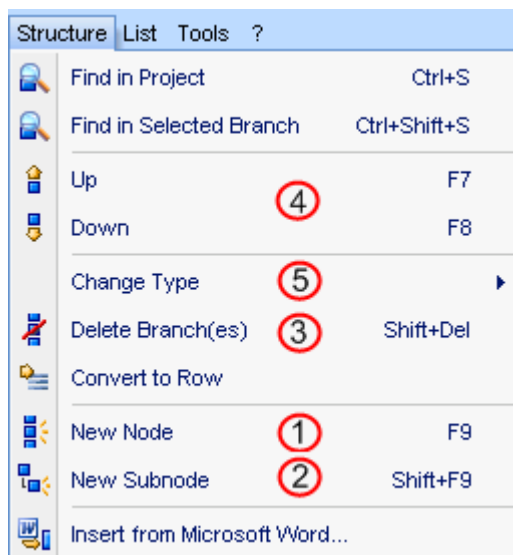


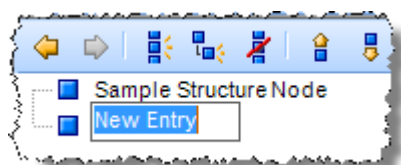
Fig.: The Structure menu with its corresponding commands

Creating new structure nodes

1. Click on the **Structure** menu^[169] and select the **New Node** command^[167] (1) found there or press the function key **F9** if you are working with the keyboard.



A new structure node will be added to the structure which you can rename immediately:



2. Enter the desired name, e.g. "Persons".
3. Press the **Enter** key.

4. If you wish to change the name once again, you can select the **Rename** command by means of the function key **F2**.



Create other structure nodes following this manner.

Creating new subnodes



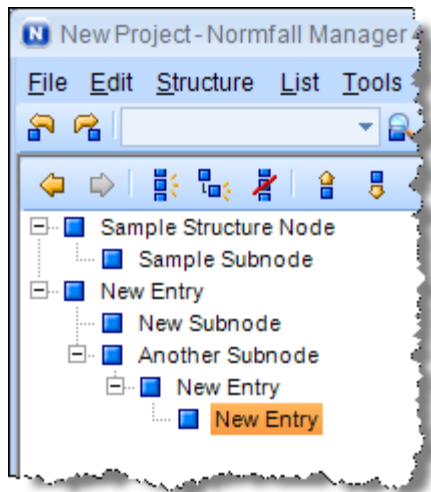
For the purpose of creating groups within one organization element you create subnodes:

1. Mark the structure node for which the subnode should be created.
2. Click on the **Structure** Menu and select the command **New Subnode (2)** or alternatively press the key combination **Ctrl + F9**



For naming the newly added subnode, please proceed as described above.

To create other nodes on the level of the recently created subnode, select it and execute the **New Node** command from the **Structure** menu.



Deleting structure nodes



To delete individual structure nodes, select them and then execute in the **Structure** menu the **Delete Branch(es)** command **(3)**. You can also execute the command by means of the key combination **Shift + Del**.



For the purpose of deleting several structure nodes simultaneously press and hold the **Ctrl** key and click on the corresponding nodes. Please note that only several nodes on the same level can be selected simultaneously. For further information on this topic, please refer to the chapter [Selecting Several Reference Rows or Structure Nodes](#)³³.

Moving structure nodes



For the purpose of moving a structure node one position upwards or downwards within one level, select it and then select the command **Up** or **Down (4)** from the **Structure** menu respectively or press the function keys **F7** (Up) and **F8** (Down).



The plus sign in front of the structure node indicates that subnodes exist. Click on the plus sign for expanding the subnodes. By clicking on the minus sign, you can collapse the list again.

You can create any number of structure nodes or subnodes and reposition them if necessary. Thus, you are completely flexible concerning the design of the structure.

In the following chapter of the tutorial, you will learn more about inserting documents into the structure^[41].

Change Type

Change type

It is possible to define different structure node types^[99]. Mark the concerned structure node and choose the command **Change type** found in the **Structure** menu **(5)** or execute it by using the key combination **Ctrl + k**. A list of all available node types will be displayed from which you can select the desired type to assign it the concerned structure node.



3.3.3 Inserting Documents into the Structure

You have created the basic organization of your structure and wish to manage information in the form of documents and files by attaching them to single or several structure nodes. The files to be attached must be present in a digital form. For further information on the measures to be taken in advance, please refer to the chapter Normfall Information Management^[19]. We also recommend to manage files to be attached in document folders within your project folder so that they can also quickly be found within your file system even without Normfall Manager. For more information on the several folders please refer to this^[52] section.

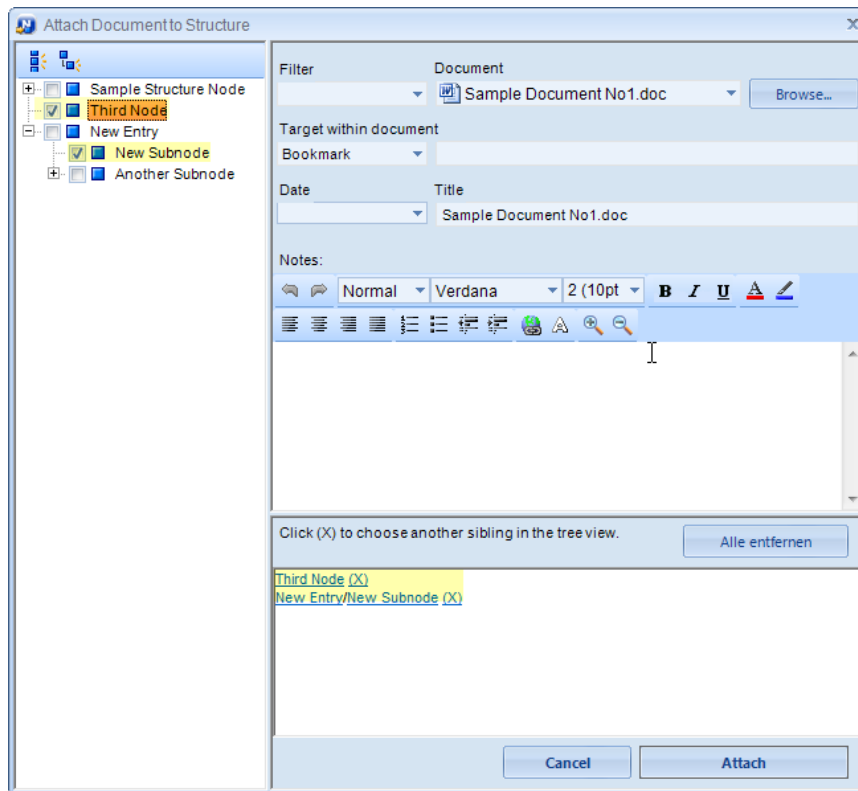
The content of your project folder, i.e. the documents you saved to it (within sub folders), is displayed by the project folder tab^[31].

Attaching files with the Attach Box

The attach box is the most comfortable way to attach a reference.

1. Open the attach box in Normfall Manager by clicking on the corresponding icon found in the main tool bar: .

Below, you see an illustration of the Attach Box.



2. Select the file to be attached by means of the **Document** field found in the upper part of the right column. The currently open file is already pre-selected if it has been opened using Windows Explorer or the file list box of the corresponding application.

- If the corresponding file is not pre-selected, open the drop-down list by clicking on the arrow symbol next to the field.

The list contains an overview of all recently opened documents. If the list does not contain the desired document,

- click on **Browse** and select the desired document from the project folder or another folder.

3. Choose the structure nodes to which the document should be attached. To do so, activate the check marks in the check boxes in front of the structure nodes in the window on the left.

All selected nodes are listed in the bottom right field.

4. Click on **Attach** in order to assign the document to the selected structure nodes.

If you have selected several nodes for attaching a document, so-called shared content locations of the document are created. That means that all comments appear automatically at each structure node to which the document is attached and that each subsequent change also has an impact on all other shared content locations. For further information, please refer to the chapter Shared Content Locations⁹⁷.

Further functions of the Attach Box

The procedure described above is useful for quickly and simply

attaching documents. The Attach Box also provides other functions by means of which you can easily select documents and characterize the references individually.

➔ Filter for certain file types:

Enter in the **Filter** field e.g. ".doc", so that you can only select between Word documents.

➔ Attach a Word or PDF file so that a specific target opens:

Select the "target" (e.g. a page) in the field **Target within the Document** which should be targeted directly when opening the document.

Enter the desired page number in the next field.

➔ Assign a date to the reference:

Enter manually the desired date in the **Date** field or enter it by means of the calendar. It will be expanded as soon as you click on the arrow symbol.

➔ Assign an alternative title to the reference:

To do so, overwrite the automatically generated filename from the **Title** field.

➔ Make comments and annotations to your reference:

These can be entered in the **Notes** field.

For more detailed information on the Attach Box⁷⁵, please refer to the corresponding chapter under the topic on attaching documents⁵⁷.

After the attachment process, the structure node ("Third Node") and the attached document ("Sample Document No. 1.doc") are shown on the right side of the Normfall application window in the so-called list view.

In the field below, the detail view, you see the information which you have entered while attaching, such as notes.

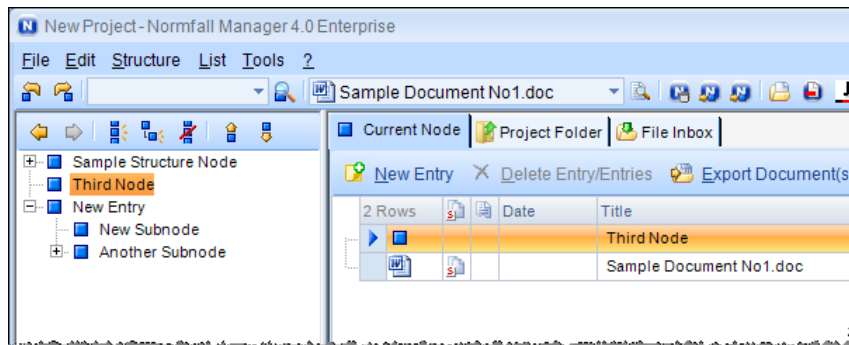


Fig.: Application window of Normfall Manager with structure and list view.

Learn more about using Plug-Ins for Attaching Documents (to a Specific Target)^[62] in the chapter Attaching Files^[58], Attaching Documents from Windows Explorer^[74], and which further Attachment Functions within the Normfall Manager Window^[59] can be found.

How you can find attached documents - especially in complex structures - is described in the following chapter of the Tutorial: Searching Attached Documents^[44].

3.3.4 Searching Attached Documents

The more complex your work will be, the more complex your structure will be, especially if various documents have to be attached. To allow you to quickly search for desired information and files even in extensive structures, in this section we will present the search functions as well as the **Document references** command (the key combination **Shift + F6**) by means of which you get an overview of the structure nodes to which the documents searched for are attached.

Search functions

1a) Find in Project

Two options are available to you to search the structure or attached documents.

For an extensive search including the possibility of defining different search criteria, proceed in the following manner:

1. Press the key combination^[174] **Ctrl + s** or, alternatively, use the **Find in Project** command^[167] from the **Structure** menu^[169].



In the list view, a new tab with the name **New Search** will open.

2. Enter the search term in the field **Find what:** (e.g. the filename or parts thereof).

Find in: Whole Project

Find what: document Go New Search

☒ All Words
 ☐ In Documents

☐ Any Words
 Date:

☐ Exact Phrase
 ☒ From 12.11.2007 To 21.11.2007

☐ Whole Words Only

Normfall Manager does not distinguish between upper and lower case letters.



3. Refine your search and select a certain period of time by means of the calendar function. To do so, place a check before **From** in the **Date** section.

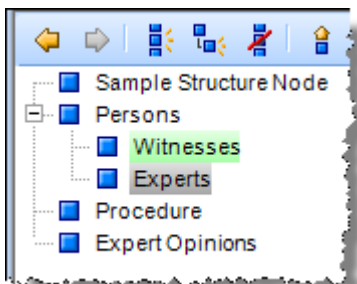
For more detailed information on further search criteria, please refer to the chapter Searching and Finding^[101].

4. Start the search by pressing the **Enter** key, or, alternatively, clicking on **Go**.

Normfall Manager lists all search results:

1 Row	Date	Title
	14.11.2007	Statement Miller.doc

In our example, we searched for files with the name "Statement". A Word document with the filename "Statement Miller.doc" has been found. On the left in the structure view, the structure node to which the document is attached has a colored background (green). In our example this is the structure node "Witnesses":



It is possible that your search returns an entire list of results; if you click on the individual search results in the list view the background of the corresponding "location" (thus, the structure node) in the structure view will be colored (green).

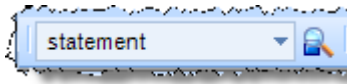
Click on Locate to arrive directly at the location in the structure view where the document is attached to.

1b) Quick Search

Use the search field in the toolbar^[172] to execute a quick search within the structure. Special search criteria cannot be entered here. The quick search is particularly useful if, e.g., the name of a desired file or parts of the name are known and thus only the

structure has to be searched.

1. Enter the term to be searched for in the search field:

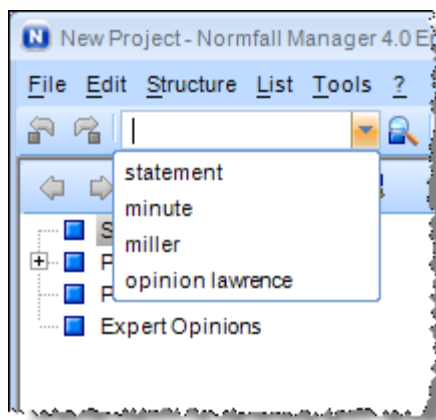


2. Press the **Enter** key, or, alternatively, click on the magnifying glass icon next to the input field.

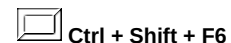
In the list view, a tab with the search result will open.

When you do not need the tabs for the search any more (for each search, a new tab will open) close them by clicking on the **x**.

If you have executed different searches you can display them by clicking on the arrow symbol next to the search field. In order to search for a term again, click on it in the list and start the search as described above.



2) Document references



Ctrl + Shift + F6

If a document has been attached to a structure node some time ago or if the structure is particularly complex containing various documents, it can be useful to have an overview once the search finishes to know whether the document is assigned to other structure nodes. In this case, proceed in the following manner:

1. Click on the corresponding document in the list view.
2. Click on **View** in the **List** menu and then on **Document references** to show the corresponding tab.

Alternatively, you can execute this command with the key combination **Ctrl + Shift + F6**.

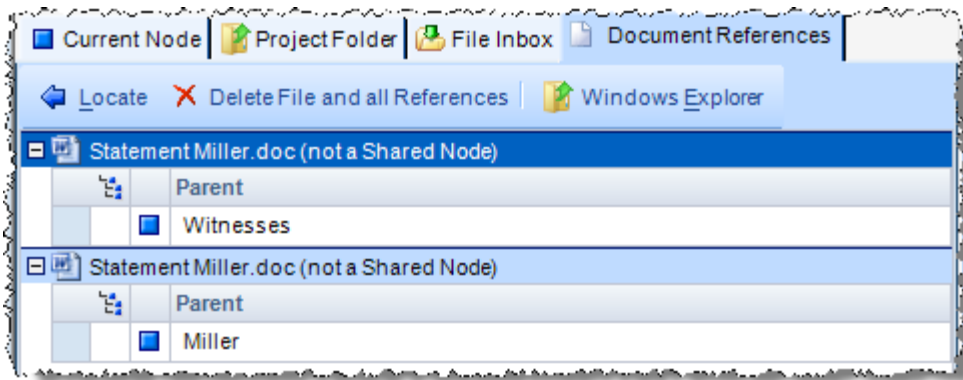


Fig.: Document references tab with all locations of the attached document

Here, all structure nodes to which the document has been attached are listed under the corresponding document. If you click on a structure node in the list view, it will have a colored background (green).

Next to the filename of the document you find information in parentheses which defines whether it is a shared content location and how many of these exist. In our example, the file "Statement Miller.doc" exists as a simple copy at the two structure nodes "Witnesses" and "Miller".

4

User Guide

4 User Guide

4.1 Creating New Projects

New Normfall projects can be created by means of different functions. Thus, you can use the file command **New Project**, create a project from a structured Word document or also from your folder structure in the file system. You can also create a new project by copying another project or by means of Windows Explorer. In the following section you will find more information on this topic.

New Normfall Project

To create a new Normfall project file, click on the menu **File** and then on **New Project**.

Alternatively, you can use the key combination **Ctrl + n**, or click on **New Project** in the toolbar if a project has not been loaded yet.

A dialog box will appear in which you will be requested to select where the new project should be created. You can choose between a new **project file** in your file system and a new **project on the SQL Server**.



- **Creating a new project file**

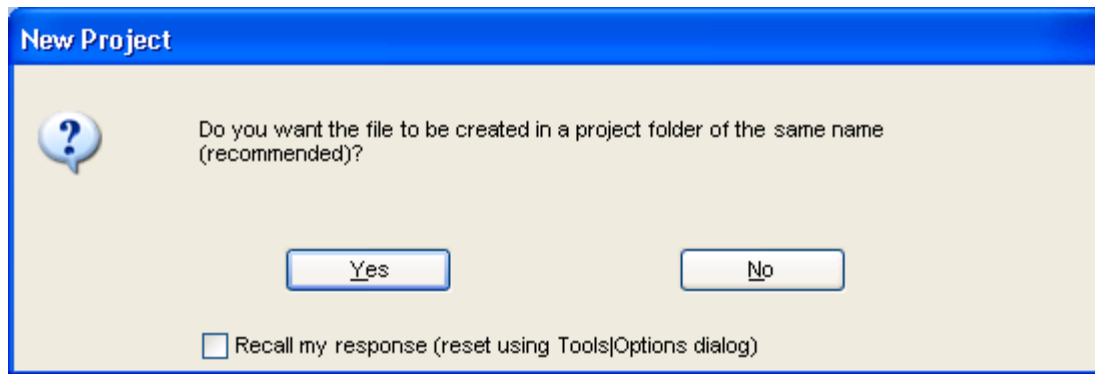
A dialog box will appear in which you will be requested to enter the name and location under which you would like to save the new project file. It is recommended that you create a separate project folder⁵² for each project and place each project folder within another root folder (named, for example, "Normfall Projects").

- Give your project file a name and save it in the project folder.

If you create several project files, please take note to place each file in its own (project) folder since the documents attached to the structure of the project will be saved in this folder.



When saving a project file a prompt will be displayed which asks you to determine whether a new project folder of the same name should be automatically created for the new project.



If you always create project folders for your projects on your own, you can answer the question by clicking on the **No** button and activate the option **Recall my response** such that the prompt will not be displayed when creating a new project any more. You can (de-)activate this setting under **Tools | Options | Prompts**. If there is still no corresponding project folder for the new project you can answer the question by clicking on **Yes** in order to automatically create a folder.

• Creating a new project on the SQL Server

You will find detailed information about this function in the chapter Projects on a Database Server.^[112]

New from Word Document

You can convert a document structured by means of the structuring function of Microsoft Word to a Normfall structure. For further information please refer to the section Converting Structured Text Documents^[81].



New from folder structure

With this function you can create a Normfall project from a folder structure found in your file system; this structure will be adopted by Normfall Manager one to one. Folders and subfolders will be represented as structure nodes and subnodes in the new Normfall project.

The files saved in the folders will appear as references to the given structure nodes in the reference list. You can convert a folder structure into a Normfall project in the following manner:



1. In the main menu^[169], click on the button^[166] **New From Folder Structure** or execute the command found in the **File** menu.
2. A dialog box will open in which you are required to select the folder to be imported.
3. Click on **OK** and define in the following dialog box where the new project is to be created. You can choose between your file system and the SQL server.
4. Give a name to the project that you are creating in the next

dialog box and confirm by clicking on **OK**.

5. The folder structure will be converted to a new Normfall project, which will then be opened.

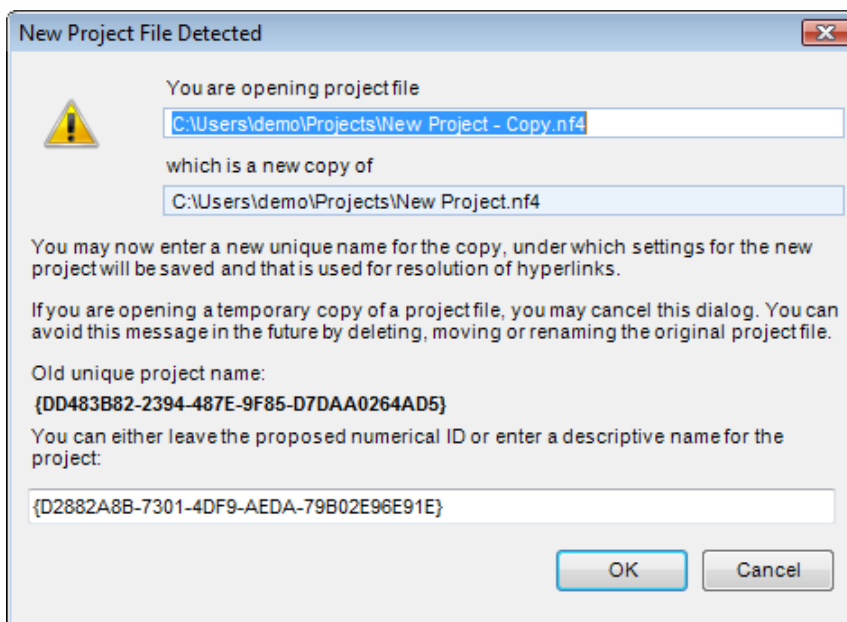
The Normfall project file will automatically be created in the folder that was used for the base of the structure.

Creating new projects by copying project files

It is also possible to create a new project by copying an already existing project file in your file system and pasting it to a new project folder to be created. If your projects generally have a similar structure, you can easily create new projects of similar structure in the following manner:

1. Create a new Project Folder^[52] in your file system.
2. Copy the desired "master" template of the project file.
3. Paste the copy from the Clipboard^[176] to the new project folder.
4. Rename the new file.

When opening a project file created by copying for the first time, the following warn dialog box will appear:



Since when creating a new project with Normfall Manager a unique file name in the form of an identification number required for the hyperlink functionality^[98] is distributed, Normfall Manager proposes - when opening a copied file - a unique name which you confirm by clicking on **OK**. The **File** menu allows to change this name under Properties^[126].

If the copy only exists temporarily, click on **Cancel**.

In order to prevent the warn dialog box completely delete or move the original file.

Creating a new project in Windows Explorer

To create a new project in Windows Explorer select the **Normfall Manager 4 Project** command from the **File | New** menu.

4.2 Special Folders

4.2.1 Folders in the File System

Project Folder

When creating a new project you are requested to define a location for the project. First of all, you create the project folder which contains the project file and in most cases all documents as well - thus, it is also the document folder. Normfall Manager is also able to automatically create a new project folder. Please refer to chapter Creating New Projects^[49] for more information on this feature. However, you can create any number of subfolders within this folder to save documents. Please take note

- that the Normfall project file is saved on the uppermost level of this folder and
- that you select a drive with sufficient free memory capacity. Extensive projects with several hundreds or even thousands of scanned office folders can require several gigabyte.

Advantageously, all project folders are collected in a subfolder (the folder that they are found in is called the root folder).

Under Tools | Options | Project you can determine for the current project as well as for future projects whether the project file should be saved in this project folder or in an alternative folder. For further information, please refer to the chapter Current Project^[151].



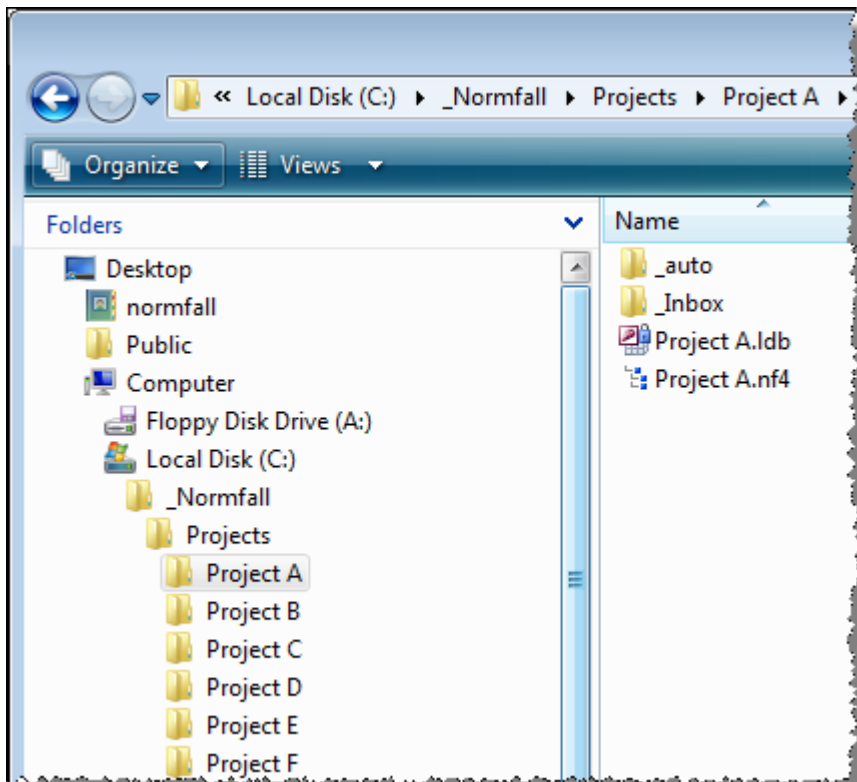


Fig.: Project folder with a subfolder for saving documents, the auto folder, the inbox folder and the project file.

Normfall Manager automatically saves documents to be attached in the project folder. You do not have to determine this location as the save location for files that you would like to attach in advance. Thus, if you attach a file which is **not yet** in your project folder, Normfall Manager automatically creates a special folder named Auto Folder^[53] and saves the corresponding file at this location.

The **Project Folder** tab in the list view of Normfall Manager shows the content of the project folder.

Auto Folder

The Auto Folder is a subfolder of your project folder and is created with the name "**_Auto**" by Normfall Manager (the preceding underline guarantees that the folder appears at the beginning of alphabetical order). All documents which are **not yet** in the Project Folder^[52] are **automatically copied** there when being attached. Thus, for example, e-mails are generally taken over to the Auto folder by means of the Outlook plug-in (see the chapter Plug-In for Microsoft Outlook^[65]) during the attachment process.

The Auto folder can be deactivated under **Tools | Options | Attach settings** such that you are requested to enter the desired location within the project folder when attaching a reference.

The Auto folder is displayed by default under the **project folder tab**. Thus, this setting can be deactivated by system administrators by means of the Normfall Manager Administration Kit.

Filename conflict

If Normfall Manager notes during an attachment process that a document with the same name already exists in the Auto folder, it executes a complete file comparison. If it is the same file, the already existing copy will be attached.

Even if the files differ minimally, a new copy will be automatically created by adding a number to the filename.

Inbox Folder

Normfall Manager creates the Inbox Folder in your project folder  automatically and has the name "**_Inbox**" (the preceding underline guarantees that the folder appears at the beginning of alphabetical order). You can save to this folder, e.g., all scanned documents which are relevant in the course of your work and should be attached to the project later on.

Note: The name of the inbox folder (English: "_Inbox", German: "_Eingang") is saved invisibly in the project options and therefore always depends on the language setting that was activated when creating a new project.



If you work with Normfall Manager in a network you can determine that a folder located at a central location in the file system will be used as the Inbox folder such that other users can access it (see below). Thus, it is possible that your colleagues can save documents for you. It is also recommended to save edited documents which are to be newly saved in the Inbox folder and to attach them again later on. For further information, please refer to the section Editing Attached Documents .

The content of the Inbox folder represents the corresponding tab of the list view  named File Inbox. Files arrive in the Inbox folder by saving them there. Alternatively, files can also be pulled directly from Windows Explorer to the list view by means of drag & drop  (see the corresponding chapter). To do so, the **File Inbox** tab has to be in the foreground.

You can also save linked documents to the inbox folder. In this case the document to which the link refers will be attached. This function is especially helpful if the respective tasks of a working process (e. g. saving and attaching documents) are executed by several members of a team.



Global Inbox Folder vs. project related Inbox folder

The **Tools | Options | Folders**  menu allows you to select a **global** File Inbox at any location in the Windows Data System and to give it any name. In this case, the inbox folder is applied to all Normfall project folders which you have created. Then, the

inbox folder created by Normfall Manager in your project folder remains empty. This possibility allows you to centrally save different types of documents. You or your employees can decide to which Normfall project folder these documents should be transferred.

To do so, it is still necessary to activate the checkmark in front of **Use Global File Inbox** under **Project | Current Project**.

Alternatively, you can create a **project related** Inbox Folder by keeping the check box described above in the **Tools** Menu empty. In this case, the File Inbox will be applied to the currently used Normfall project folder.

Export Folder

Documents which are further edited outside of Normfall Manager to, for example, send them as an e-mail, are copied to the Export Folder. This is a temporary folder where the content will automatically be deleted after a pre-defined number of days. Normfall Manager creates this folder in a folder which is independent of your Project Folder^[52] and manages it automatically.

The menu **Tools | Options | Folder**^[142] allows you to change settings with respect to the Export folder.

Backup Folder

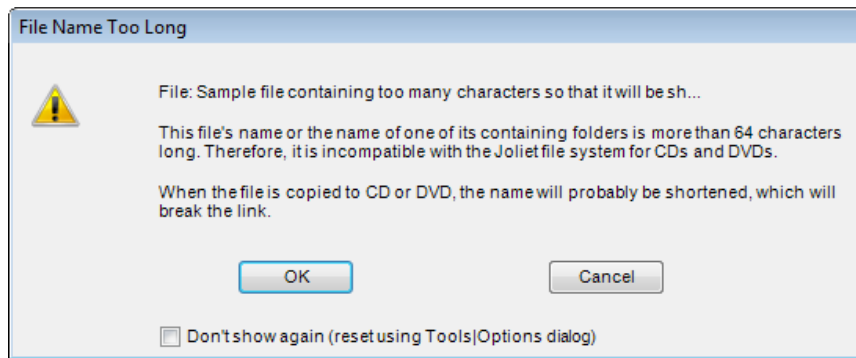
If you do not work on a database server a Backup copy^[107] of the project file will optionally be created each time you close it.

The Backup folder is by default the TEMP folder of the system. The contents of this folder will be deleted from the system in the process of data media clean up. If this is not desired, another Backup Folder can be selected in the options.

Maximum Length of Filenames

If a project is to be burned, for example for data backup on a CD or a DVD, the maximum length of filenames may not exceed 64 characters since CDs and DVDs work with the so-called Joliet file system which can process only filenames of up to 64 characters. During the burning process, the filenames are reduced if necessary and, thus, the references to these attached documents may be lost.

When attaching files with longer filenames, a corresponding warning notice will appear in Normfall Manager:



You can deactivate this dialog box in the menu **Tools | Options | Prompts**.

When attaching e-mails, the filenames are automatically reduced to a maximum length for Joliet (64 characters).



4.2.2 Folders in Microsoft Outlook

Normfall

It is possible to automatically collect e-mails in a special folder in Microsoft Outlook when attaching. This folder is called "**_Normfall**" and is created in the Inbox once you attach e-mails by means of the Plug-In for Microsoft Outlook^[65] to your project. To do so, activate the corresponding option under **Tools | Options | Attach settings**^[147]. The corresponding e-mail will thus be moved to the **_Normfall** folder.

Normfall Transfer

The folder "**_Normfall Transfer**" is automatically created by Normfall Manager in the "**Sent Items**" folder of Microsoft Outlook as soon as you attach elements with a command of the plug-ins for Microsoft Outlook^[65] to your project. When being attached, the elements are transferred from the "**Outbox**" folder to the **_Normfall** transfer folder and are attached within the same step - provided that a Normfall project is currently open.

However, it is also possible to manually copy e-mails to this folder. In this case, the Attach Box^[75] will open automatically by means of which you can select structure nodes to which you want to attach references. If you define special filter rules in Outlook, you can automatically move certain e-mails to the **_Normfall transfer folder** and attach them subsequently.

4.3 Saving and Attaching Files

When you connect documents in the form of files to structure nodes^[35] in Normfall Manager, this is called attaching files^[58] to a structure or in a Normfall project^[35]. Attaching to a structure node works essentially like copying files to a folder. Additionally, Normfall Manager makes certain commands available to you that make working with these files efficient and comfortable.

Before attaching files, you should decide whether you would like to keep the files in a folder structure or whether you would like to allow Normfall Manager to completely take over the task of managing the files - or copies thereof. For more on this topic, read the chapter Storing Files^[57].

4.3.1 Storing Files

During the attaching process you have the option to attach a document as an original or copy. To attach an original document, **one** of the following conditions must be fulfilled:

- The document is already in the project folder^[52] of the project to which it should be attached.
- The document is available on the Internet or a document management or e-mail system that distributes unambiguous document IDs and is explicitly supported by Normfall Manager.

If one of these conditions is **not** fulfilled, a copy of the document can be created in the project folder during the attaching process. When doing so, you should be certain whether this copy should be used as the original in the future, meaning that you will edit this file in the future, or left simply as a copy (for example, for archival purposes).

The following sections, Manual Storage^[57] and Automatic Storage^[58], provide an overview on this subject.

Manual Storage

There are many documents that you regularly use and edit and that you would like to be able to quickly open from an application (e.g. text processing). Think of, for example, letter templates or drafts that with time turn into complete documents and elaborated texts.

These documents should also be available using the folder structure of a file system (i.e. Windows Explorer) because other applications cannot see inside the structure of a Normfall project to open the needed file.

For this to be possible, you must **manually** move your documents to the project folder^[52] (for example, in a corresponding subfolder found there); or you can work in the opposite direction by turning the existing folder structure into the project folder^[124].

Documents that are **not** in the project folder can automatically be **copied** to the Auto folder^[53] of the project folder during the attaching process. More on this can be found in the chapter

Folders^[142].

Likewise you should **manually** save those files in the project folder to which you would like to create a reference using a specific **target**. These can be, for example, extensive Word, Excel, PowerPoint or PDF files that you would like to later open directly to a specific passage, comment or page.

For attaching to a target you can use so-called plug-ins or add-ins. More information can be found in the section Plug-ins for Attaching Documents to Specific Targets^[62].

Automatic Storage

Documents that are not already in the project folder will automatically be copied to a collection folder (the Auto Folder^[53]) within the project folder when being attached^[58].

The Auto folder can contain many documents over time. You can find them however quickly and easily in the structure of your Normfall project!



This possibility is ideal when you

- want to open the document **only in your Normfall project** or
- want to make a **snapshot** of or archive the document in the project folder.

Please take note that Normfall Manager does not delete documents when you delete references from a project! To delete documents, go about this in one of the following ways:

- use the command Windows Explorer^[135].
- use the key combination **Shift + F6** to show the **Document References** Tab

You can deactivate automatic storage in the Options^[141]. There you can also determine whether the original location of the file should be recorded.

*If a copy of a document has been created in the Auto folder, you can use the **Original** button found in the toolbar^[172] of the detail view^[34] to display the original document.*



4.3.2 Attaching Files

To attach documents you can use different functions which can be divided into two groups:

- attachment functions that are found **in the application window of Normfall Manager**^[59]
- and
- attachment functions that are available **outside of Normfall Manager**^[61].

Furthermore there are attachment commands that **immediately**

create a document in the list or structure and attachment commands that call up the Attach Box^[75] to attach the document to several locations of the structure at the same time.

Files that you would like to attach are typically found in the file system of your computer or a file server that is supported by Normfall Manager, but can also be found in several external document sources^[78] such as document management systems (DMS) and online databases (e.g. [Juris](#)).

Attachment Functions within the Normfall Manager Window

In the following section you will find a summary of the functions with which you can attach documents from within the Normfall Manager application window^[29]. For more detailed information, references to the command overview are provided.

Commands Found in Menus and Toolbars

Attach



Attach

In the toolbar of the detail view you will find the **Attach** button with which you can attach a file to a new (empty) row in the list view or to a new structure node. This function is also found in the **List** menu and can be called upon using the function key **F12**.



F12

You usually use this command with one of the following commands: New Annotation^[134] (**F11**) or New Node^[133] (**F9**).

Proceed as follows:

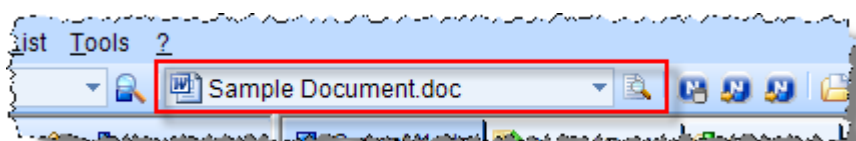
1. Create a new empty reference row by clicking on **New Annotation** in the list view.
2. Execute the command **Attach**.
3. Select the file that you wish to attach from the window that opens and then click on **Open**.

To attach a file to a new structure node^[133], create a new structure node using, for example, the **function key F9**, name it and then execute steps 2 and 3.

Using this same method you can also insert URL^[81] and Juris references^[79] to the list view.

Quick Attachment List

In the toolbar of the main menu there is a drop-down list in which recently used documents are displayed:



This is also referred to as the Quick Attachment List.

To display a document from the list, select it^[168] and click on the icon next to it (which is marked by a magnifying glass).

To attach a document to several locations of the structure simultaneously, select it and click on the next command to open the attach box^[137].

To attach a document directly to the list or structure view, select the two buttons **To Row** and **To Node** described below. They can also be found in the tool bars of the Plug-ins^[62] and offer the same functionality.

Depending on where the files are saved, they are highlighted in different colors:

Files within the project folder are highlighted in lilac color.

External files (e. g. linked Outlook elements) are highlighted in light blue color.

Documents that are not in the project folder are not highlighted but remain in white color within the list.

To Row



With this function you can attach the given document from the drop-down list (see above) directly to the currently selected structure in the list view.

To Node



With this command the given document from the drop-down list will be pasted as a structure node in the structure view.

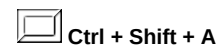
You can convert a file attached to the structure to a row in the reference list at any time; likewise you can convert a row to a structure node. How to do this is explained in the section Converting References^[96].

Holding the **Shift** button when attaching with this button will attach the file as a subnode in the structure.

Attaching several files



To attach several documents at the same time, click on the button **Attach Files**. A file selection dialog box will appear in which you can select individual files by pressing and holding the **Ctrl** key while clicking on the files that you would like to attach.

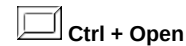


To select a sequence of several files one directly after another, click on the first file in the list, press the **Shift** key and then click on the last file of the list so that the entire list of files is selected.

Attach to the list

Click on **Open** to attach the selected files to the currently selected structure node in the list view.

Attach to the structure



Ctrl + Open

To attach the files in the structure view, click on **Open** while simultaneously pressing **Ctrl**.

Attach to the structure as a subnode



Ctrl + Shift + Open

To paste the files as subnodes of the currently selected structure node, click on **Open** while simultaneously pressing **Ctrl** and **Shift**.

Commands Found in the Tabs

Depending on which tab is selected in the list view^[30] you will have different functions available to you.

The following table is a short summary of the commands found in tabs that are relevant for attaching documents.

Command	Tab
Attach	Project Folder, Recent Docs (Project)
Move File	File Inbox
Attach Copy	Recent Docs (System)
Attach Box	all tabs

How to attach documents from the tab lists can be found in detail in the corresponding reference chapter of each command: Attach^[155], Move File^[156], Attach Copy^[156] and Attach Box^[137].

Attachment Functions outside of Normfall Manager

In the following section you will find a summary of the functions with which you can attach documents **outside** of the Normfall Manager application window^[29].

The Normfall Button

After opening a project the Normfall button will appear in the lower right corner of your screen in the Windows task bar. With this button you can attach a document that is currently open directly to your project using the attach box.



Fig. 1: The Normfall Button in the Windows task bar

The position of the button can be changed; additionally the button can be entirely hidden from view. To do so, click on the Normfall button with the right mouse button and choose between the three operation modes found in the context menu: **Show in Task Bar**, **Hover mode** and **Hide**.

Under Tools | Options | Attach Settings^[148] you can use the option **Activate Normfall Button on Desktop** to show or hide the button

by default.



Fig. 2: The Normfall button in hover mode

In the context menu you will find a list of all active projects. Here you can choose for which projects the Attach Box^[137] should be opened as soon as you click on the button.

If you press and hold the **Shift** key while clicking on a project, the project will merely be activated (moved to the foreground) but its attach box will **not** be opened. There you can create a reference using, for example, the Quick Attachment List^[59] or the commands found in the Recent Docs tabs^[32].

Plug-ins for Attaching Documents (to a Specific Target)

What are plug-ins?

Normfall Manager allows you to install so-called plug-ins, which are also known as add-ins.

Plug-ins are complementary modules of a piece of software (in this case Normfall Manager) that are embedded in other applications; that is, they are integrated into the interface of the software. You can install plug-ins and add-ins for the full version of Adobe Acrobat 7.0 (and higher) as well as Microsoft Office Package (beginning with the 2003 Version) and Microsoft Internet Explorer (beginning with Version 7.0), with which you can attach documents and files to your Normfall project directly from each application.

Plug-ins are typically displayed in a new toolbar found in the application window of the programs for which they are installed.

The plug-ins are activated in the **Tools** menu using the command **Plug-in Installer**^[139].

What can the plug-ins of Normfall Manager do?

Attaching to a specific target is made particularly comfortable with plug-ins. You can use plug-ins to determine a specific location within an extensive document of several hundred pages as target of a reference so that the attached document will automatically be opened to this location in the future.

This function is very useful in various situations, e.g.

- if a witness deposes at a court and you wish to object a certain document
- if you are searching for certain documents during an arbitration procedure
- in case of an extrajudicial hearing procedure
- during a telephone conference
- during dictation of a pleading

- etc.

You save time and are always perfectly informed.

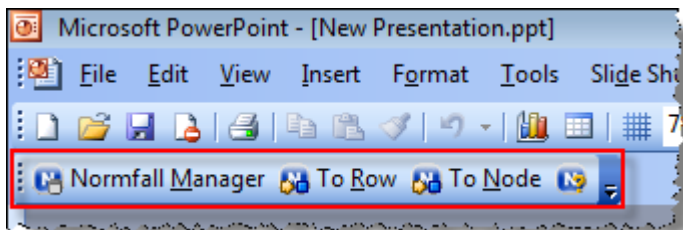
Since plug-ins are intended for attaching to a specific target and it is often the case that you would like to attach to more than one target in large documents, it is recommended that you **manually save** documents that you would like to attach using a specific target to your project folder. Further information on this topic can be found in the sections Storing Files^[57] and Special Folders^[52].

Under **Tools | Options | Folders**^[141] you can activate the Auto folder as the location to which documents that are not currently found in your project folder will automatically be moved when being attached to your structure.

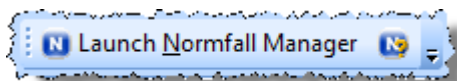
If the Auto folder is **not** activated, a dialog box will appear, with which you can save the document to your project folder. This method will save a copy to your project folder which you will be able to edit in the future.

What do plug-ins look like?

If Normfall Manager has already been started, the plug-ins appear in the form of a toolbar in each application and typically offer the following commands:



If Normfall Manager has not already been loaded, the button **Launch Normfall Manager** with the plug-ins for the Microsoft Office Package which allows you to load the application appears.



Activating and Deactivating Plug-ins

Installation

To be able to use a plug-in it first has to be installed on your computer. If you have administrator rights on your computer, you can install and uninstall plug-ins quickly and easily using the command **Tools | Plug-in Installer**^[139].

Show/Hide

You can show or hide the toolbar^[172] of the plug-ins in each application; thus activating or respectively deactivating efficiently the plug-in.

This setting is valid for you personally on all computers that you

log on to with the same Windows account.

To show or hide the toolbar, click with the **right mouse button** on **any** toolbar of the application where you would like to show or hide the plug-in. A context menu^[167] will open in which you can select the toolbars that you would like to show. Select the toolbar that is denoted with Normfall.

Commands in the Plug-ins

Each plug-in has a toolbar^[172] that typically contains the following commands^[167]:

Launch Normfall Manager

Use this command to choose a project to be opened to which you would like to attach documents.



Launch Normfall Manager

The following commands affect the active Normfall project. This is the currently open project in which you have last carried out an action (more precise: the application window that has lastly had focus).

Normfall Manager

This command opens the Attach Box^[137] of the active project. This allows you to attach the document to several locations of the structure simultaneously; any entries within the comment editor will automatically be synchronized for all references.



Normfall Manager

To Row

Use this command if a structure node of your structure is already selected and the document should be attached as a **reference row**^[36] of this structure node.



To Row

To Node

Use this command if a structure node of your structure is already selected and the document should be attached as a **structure node**^[35] under the currently selected one.



To Node

Hold the **Shift** key long enough during the attaching process and the structure node will be created **as a subnode**.

If the document that you would like to attach is not located in the project folder, it will be saved there during the attaching process. This has the same effect as the **Save as command for the Microsoft Office plug-ins (with the exception of Outlook); this means that you will edit a copy of the document in the future.**



Plug-in for Microsoft Outlook

Types of Outlook windows

Outlook has a **main window** and opens another window for each so-called element. An element can be, for example, an e-mail, a contact, a note or an event.

The toolbar of the plug-ins is available in **both types of windows**. In the main window many of the plug-in commands can be applied to **several selected elements of a list** at the same time.

Normfall Manager attempts to find the optimal type of attachment for each type of element: **unsent e-mails** will, for example, be sent^[66] and elements with **frequently updated** contents (e.g. contacts) are linked^[66], so that the attachment refers to the updated version of the element in Outlook's saved data.

Attaching e-mails

In the chapter Commands in the Plug-ins^[64], the basic function of the three attach commands **Normfall Manager**, **To Row** and **To Node** is explained.

When attaching e-mails via the plug-ins the text of the e-mail message is automatically copied into the text editor of the detail view and locked for editing, which is indicated by the grey shaded text editor area. For more details please refer to the chapter Detail View^[34].

Copying e-mails to the Inbox Folder



The Outlook plug-in has the special command **To Inbox**. Apply this command to pre-sort emails that you would like to attach later.

The elements will be copied to the inbox folder^[54] of the active project. This can also be, depending on the project settings, the global inbox folder.

Attaching e-mails with attachments

When attaching e-mails with file attachments, the file attached to the e-mail will be extracted - that is, separated from the e-mail - and displayed indented in the list view:

Date	Title
02/14/2007	Sample Node
02/14/2007	Mail Message
02/14/2007	Attached Image File.jpg

In this way it becomes clear in the list view, which file attachments belong to an e-mail so that these can be directly opened using Normfall Manager.

*With e-mails that are not attached using the plug-in but rather with the drag and drop^[91] technique, the **e-mail attachments remain in the e-mail** and are not extracted. In addition, all Outlook elements attached in this manner appear with **e-mail icons**.*



Moving e-mails while attaching

Under **Tools | Options | Attach settings**^[147] you can determine whether e-mails are moved to a special subfolder of the inbox during the attaching process. You then manage these e-mails only in the project structure and keep merely a "backup copy" in Outlook.

Automatically attaching e-mails when sending

Concerning unsent e-mails the function of the attach commands change to "Send and Attach". The e-mail will first be sent, then a copy of the sent e-mail will be attached to your structure.

Linking elements instead of copying

With element types with frequently updated contents such as notes, contacts and events, the function of the attach commands changes to "Attach as Link", so that the reference refers to the current version of the element in Outlook's saved data.

The link can however be "broken", if you move the element within Outlook. For more on this read the section Moving Linked Outlook Elements^[67].

Tabular Overview of the Outlook Attachment Types

The following table provides an overview of what happens when executing each attachment command for each type of element:

Outlook Element	Element Type	Buttons of the Plug-ins			
		Normfall Manager	To Row	To Node	Copy To Inbox
E-mails	sent/received	- Saves the e-mail to the Normfall project folder. -Opens the attach box.	- Saves the e-mail to the Normfall project folder. - Attaches it to the current structure node.	- Saves the e-mail to the Normfall project folder. - Adds it to the current structure node as a subnode.	Saves the element to the file inbox folder.
	not yet sent	- Sends the e-mail. - Saves it to the Normfall project folder. -Opens the attach	- Sends the e-mail. - Saves it to the Normfall project folder. - Attaches it to the	- Sends the e-mail. - Saves it to the Normfall project folder. - Adds it to the	

		box.	current structure node.	current structure node as a subnode.	
Notes, Contacts, Events, etc.	all	- Opens the attach box. - Creates a link.	- Creates a link in the reference list of the current structure node.	- Creates a link as a subnode of the current structure node.	

Tip for attaching from the Drafts folder:

Elements that can be sent cannot be attached directly from this folder. This is made clear by the inactive plug-in commands in the Outlook toolbar. Attaching will be possible as soon as the given element is opened for sending or editing.

If a linked element is moved in Outlook (for example, a note or a contact), whether or not the reference to this element remains valid in Normfall Manager depends on the type of message store used.

In an Outlook PST file links remain valid even if the element is moved. On an exchange server this is **not** the case. With third party message storage this depends on the architecture of the message storage.

When moving linked elements between several message storages (for example, during the archiving process in Outlook), any links will be lost.

Tip: Since all Outlook elements contain unambiguous identification numbers, moved elements can generally be found again and the links to these elements restored.



If you would like to open an Outlook element with Normfall Manager, but the element cannot be found, a dialog box will appear with the title "Select Folder", in which you can select the Outlook folder or a superior folder of the Outlook folder or respectively the message store, which will search for the element in that folder. You can cancel the search, which can be fairly lengthy, at any time. As soon as the element has been found the link will be restored.

Please take note that the project has to be open with write access so that a reference to an element that has been found again can be restored.



Plug-in for Microsoft Word

The Word plug-in has two different application areas: creating attachments and converting structured text to a Normfall Manager structure⁶⁸. First, the attachment of documents will be handled:

Attaching documents

The Normfall plug-in for Microsoft Word makes it possible to refer to any section of a Word document marking them by so-called bookmarks.

*It is recommended to show bookmarks in Microsoft Word. To do so, refer to the Tools | Options | View menu and check the **Bookmarks** checkbox.*



In the chapter [Commands in the Plug-ins](#)⁶⁴ the basic functions of the three attach commands **Normfall Manager**, **To Row** and **To Node** is explained.

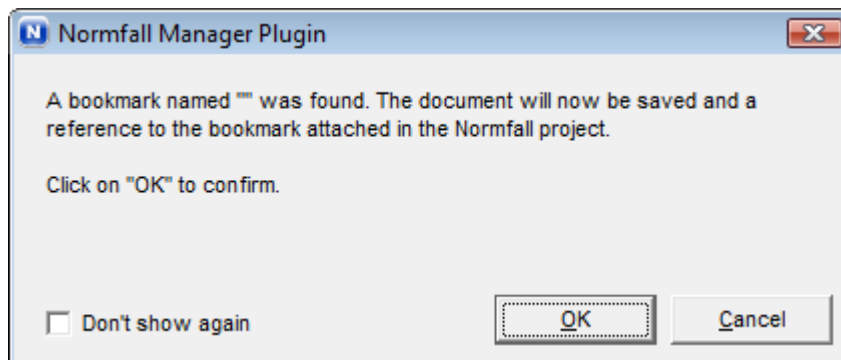
If a text passage is selected when attaching, this passage will automatically be attached using a bookmark generated with the name "Normfall" and a number determined by increasing numerical order. Additionally, the passage will be copied into the text editor of Normfall Manager and the beginning of the passage is pasted into the title field.

If a text marker (text cursor) is already in an area of the document marked by a bookmark, the reference will refer to this bookmark.

If **no** text passage has been selected (and if no bookmark exists at the current text passage) the document will be attached as a whole. Thus, in order to refer for example to any page in the document when attaching it, at least one word must be selected on the desired page.

Inserting a bookmark is an alteration to the document.

Therefore, a corresponding warning will appear when attaching the document:



Click on **OK**. To no longer receive this message, place a check in front of **Don't show again**. In the menu **Tools | Options | Prompts** you can change this setting again.

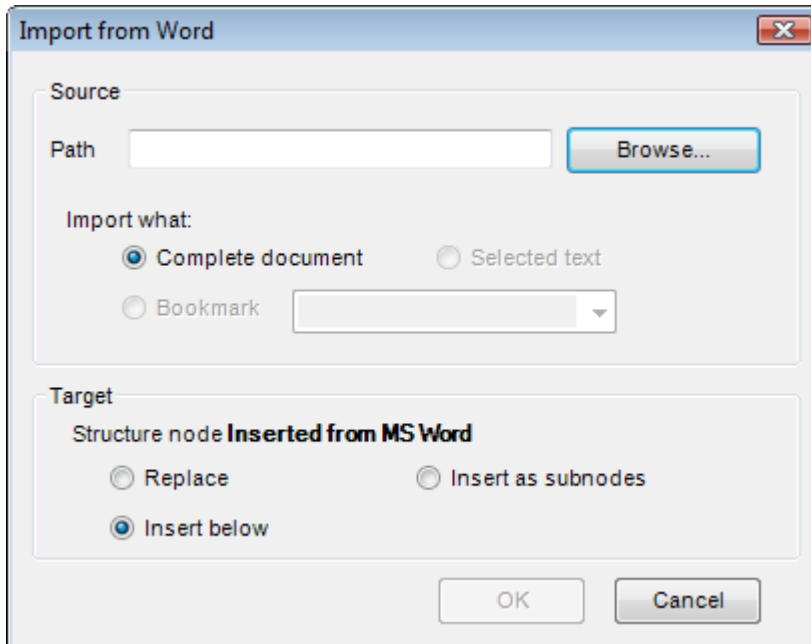
If the document is not yet in the project folder a further dialog box will appear that asks you to save the file to the project folder.

Creating a Normfall structure

Using the command **To Structure** you can create a Normfall structure out of a structured Word file (for more see the chapter Creating a Normfall Structure from a Word Document⁸¹).



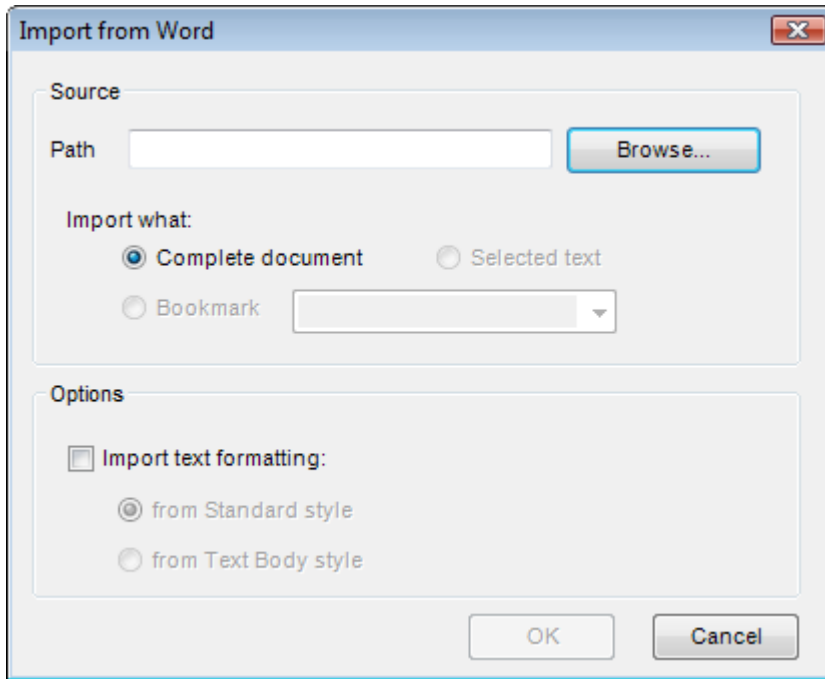
If a project file is already open the following dialog box will appear:



The path of the document that you wish to convert is given under "Source". You can determine whether the entire document, selected text, or a section beginning with a given bookmark should be converted.

Additionally you can determine to which location in your structure the text should be inserted. You have the option of replacing the currently selected structure node, inserting the text below this structure node on the same level or as a subnode.

If there is no project file open, the following dialog box appears:



- a) Under "Source" you will find the path of the Word file that you would like to convert. You can decide whether the complete document, selected text or a section of the text after a certain bookmark should be converted.
- b) Click on **Browse** after "Path", to define the name and location of the project file that you would like to create.
- c) Select the text formatting under "Options" that should be imported.

You can also select an existing project file. This will then irreversibly be overwritten during the input process.



Plug-in for Microsoft Excel

The Normfall Manager plug-in for Microsoft Excel makes it possible to refer to specific targets in worksheets or cell ranges in extensive Excel tables with several table sheets. A sheet, cell range, name or local name can be defined as the target of the reference.

Attaching with the plug-in

In the chapter Commands in the ⁶⁴plug-ins⁶⁴ the basic function of the three attach commands **Normfall Manager**, **To Row** and **To Node** are explained.

On the left side of the plug-ins toolbar there is a so-called toggle button with the name **Generate Name**, which can be activated or deactivated. The possible states are "Generate cell range names (OFF/ON)". If this button is **activated**, a new global name will automatically be created for each attachment in the Excel workbook to which the reference will refer (e.g. "normfall5"). A reference can also be created for a local name which has to be

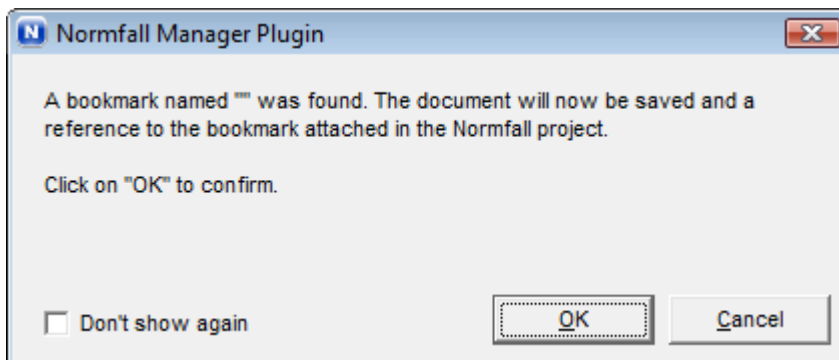
entered in combination with the table sheet.

If the toggle button is **deactivated**, a reference of the type "range" will be created. For this range, you can define a name in Excel that can be entered as the reference target in Normfall Manager.

Select a range that should be attached and then select the desired attach command from the Normfall toolbar.

Creating a name for a cell range is an alteration to the document.

Therefore, a corresponding warning will appear when attaching the document:



Click on **OK**. To no longer receive this message, place a check in front of **Don't show again**. In the menu **Tools | Options | Prompts** you can change this setting again.

If the document is not yet in the project folder a further dialog box will appear that asks you to save the file to the project folder.

Attaching manually

All cell ranges can also be entered manually in the attach box as reference targets. In this case a special syntax needs to be taken into consideration. The following table provides an overview of this syntax:

Reference Target	Syntax	Example
Sheet	Sheet	"Table1"
Range	Sheet!Range	"Table1!A10:D10"
(Global) Name	No Syntax	"normfall12"
Local Name	Sheet!Name	"Table4!normfall8"

If you show the file information in the detail view by clicking on the plus button, you can also enter the reference target manually into the field **Pos.** using the syntax found above.

Plug-in for Microsoft PowerPoint

The Normfall Manager plug-in for Microsoft PowerPoint makes it possible to refer to a specific slide within a presentation.

In the chapter [Commands in the Plug-ins](#)⁶⁴ the basic function of the three attach commands **Normfall Manager**, **To Row** and **To Node** is explained. Each of these creates a reference to the currently selected slide.

Using Normfall Manager with Microsoft PowerPoint for presentations

Using Normfall manager you can arrange your presentations in a more flexible manner by opening presentations directly to specific slides. You can return to slides that have already been presented or skip to slides that would usually come later in the presentation. The following instructions describe how to do this using a laptop and projector:

1. Create a structure of your presentation using Normfall Manager.
2. Attach the individual slides of your presentation to the thematically corresponding structure nodes.

For the presentation:

3. Start Normfall Manager.
4. Open the first slide of the presentation and start the presentation mode in PowerPoint using function key **F5**.
You can now call up individual slides of the presentation and navigate flexibly forward and backward through your presentation.

Manually attaching PowerPoint slides

If you attach PowerPoint slides by hand (by filling out the corresponding boxes in the reference window or in the detail view [34](#)), you have two types of targets available:

- A slide ID will automatically be created by PowerPoint and remains available even if the numerical order of the slides changes due to the insertion or removal of slides. With the slide ID you always have the option of attaching directly to a specific slide. Therefore, the plug-in always attaches the slide ID.
- You can also enter the slide number as reference target but if you change the order or number of slides in your presentation this reference could be moved to another slide.

Plug-in for Microsoft Internet Explorer

For Microsoft Internet Explorer beginning with version 7.0 there is a plug-in that can be used to attach entire web pages by default as **offline versions** (in the form of a **copy of the web page** in HTML format) to your project. Sole exception are offline versions of Juris Documents⁷⁹ which are saved as **PDF files**.

Additionally there is the option of attaching an **online version** of the web page in the form of a **bookmark** to the corresponding web page.

*Tip: When attaching web pages as offline versions you can however open and view the web page online by using the **Original** button found in the toolbar of the detail view. In this way actually both functions (offline and online versions) are used. Further information on this function can be found in the chapter [Show Original](#)^[135].*



To attach web pages in this way use the functions found in the Normfall toolbar:

In the chapter [Commands in the Plug-ins](#)^[64] the basic functions of the three attachment commands **Normfall Manager**, **To Row** and **To Node** are explained.

Plug-in for Adobe Acrobat

The Normfall Manager plug-in for Adobe Acrobat makes it possible to attach directly^[36] to a page, comment, or entire text passage in an extensive PDF document of several hundred pages.

In addition this plug-in makes it possible to attach to special PDF targets (called Named Destinations): This type of target doesn't only refer to a specific page, but to a given **display detail** with a **Zoom** factor, that will be recreated when opening the attached document. This feature is most useful in cases where, for example, very large Excel sheets are displayed in a very small form that fits on a DIN/ISO A4 PDF page.

Attaching this type of PDF target is the default setting in this plug-in. Since the target is first created with the reference, you must have **write access** to the document that you would like to attach.

In the chapter [Commands in the Plug-ins](#)^[64] the basic function of the three attach commands **Normfall Manager**, **To Row** and **To Node** is explained.

Selecting the target type

Please see the chapter [Different Versions of Acrobat](#)^[178], which contains more information about opening attached PDF files.



In the drop-down list on the left of the buttons, the target type that is most appropriate for the current selection will automatically be displayed:

If you have, for example, used text tools to select a text passage, **Attach Text** will appear in the drop-down list.

If a note was created and you have selected it by clicking on it in the document, **Attach Annotation** will appear

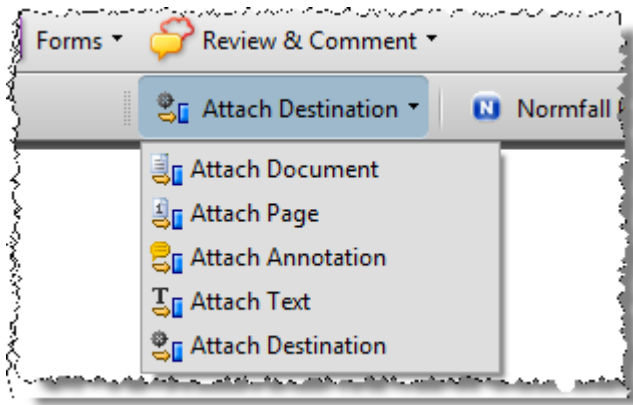


Fig.: Drop down menu of the Acrobat plug-in

As soon as you click on one of the attachment commands to the right, an attachment of the corresponding type will be created.

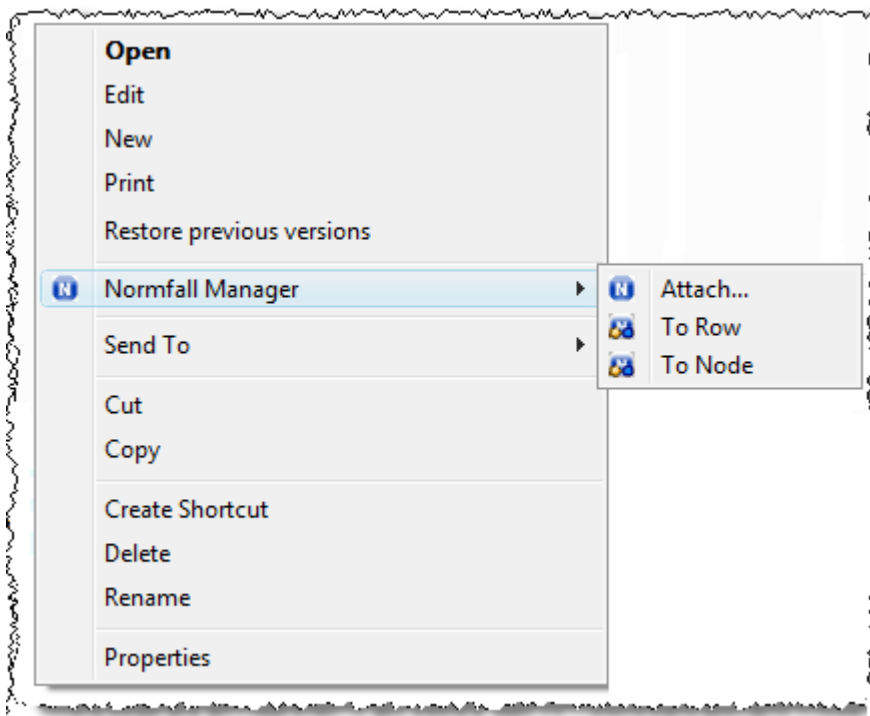
You can also choose a different type in advance to attach, for example, **the entire document** instead of the current display detail or you can refer **to the page** instead of creating a target, so that the document does not have to be changed.

Creating a target or an emphasis for a text passage is a change to the document, which will call up the following dialog box requiring you to save the file:

Confirm by clicking on **OK**. To no longer receive this message, place a check in front of **Don't show again**. (In the menu **Tools | Options | Prompts** you can change this setting again.)

Attaching Documents from Windows Explorer

To attach files directly from Windows Explorer to an open Normfall project, click on the given files with the right mouse button to open the context menu:



In the chapter Commands in the Plug-ins^[64] the function of the three attach commands **Normfall Manager**, **To Row** and **To Node** is explained (the command **Open Project** does not exist here).

*The commands **To Row** and **To Node** also work when several documents are selected! In this case all selected documents will be attached.*

The Attach Box

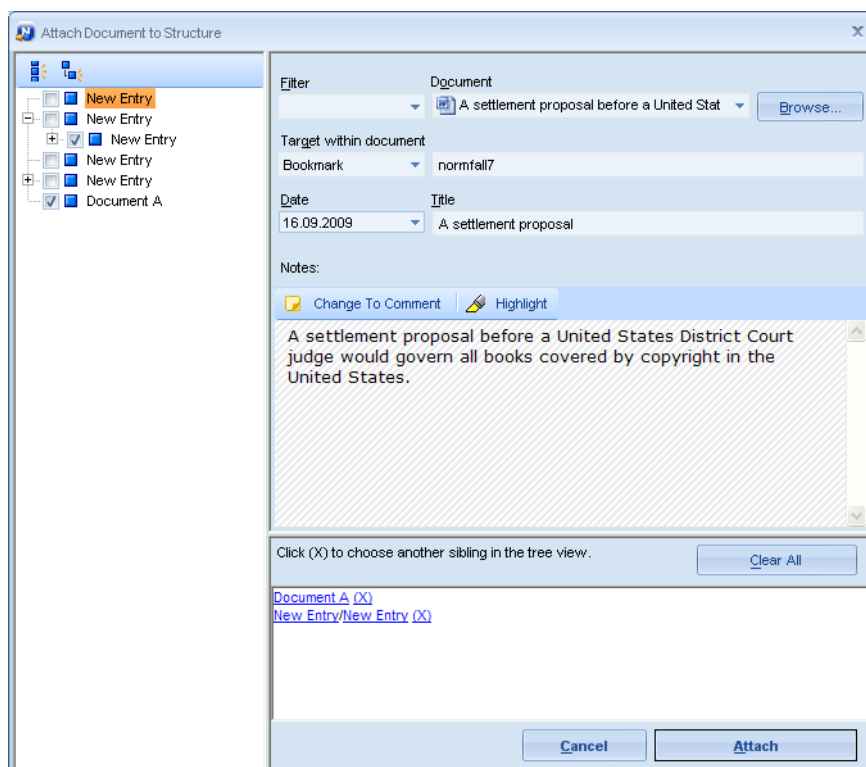
With the attach box multi-dimensional references can be created for **several structure nodes at the same time**. The reference rows created for a file are created as shared content locations^[97], such that later changes to the comment text will have general impact.



Attach Box

The attach box can be displayed using different commands^[167] within the Normfall window^[29], for example, in the tabs^[30] **Project Folder**, **File Inbox**, **Recent Docs (Project)** and **Recent Docs (System)**, as well as by clicking on the Normfall button^[170], which is located outside of the application window^[29], or by means of the plug-ins^[62] in other applications.

The interface of the attach box is divided into three views like the application window of Normfall Manager. The size of each view can be changed by pulling the separators^[171] found between the views with the mouse.



To the left is the structure view. On the small toolbar you will find the commands **New Node** and **New Subnode**, which you can use to add new structure nodes to your structure. You can expand and collapse structure nodes that have subnodes by clicking on the plus and minus buttons.

In the upper window to the right of the attach box you will find the following fields and buttons:

Filter

Here you can filter recent documents in the field **Document** according to the type of the file needed. If you enter, for example, "*.xls" into the **Filter** field, you will only find results in the **Document** field that are in xls format.

You can also search for an entire document name and use "?" as a replacement for an individual letter. If you cannot remember the exact name of the person that you would like to search for, you can search for, for example, "?on". This will return all documents with "Ron", "Jon", "Don", etc. in the file name.

To **replace several letters**, use the "*" character as a filter.

Example: With the filter "com*", all results will be listed that contain "com" in their name. The following results could be returned, for example, "computer", "comport", "communication".

Document

In the field **Document** the last used document is generally found.

On the other hand, if you open a file using the corresponding command of a certain program, the file name does not necessarily appear automatically in the field **Document** (this depends on the program). By clicking on the arrow symbol next to the field you can choose the desired file from a drop-down list. This list contains documents that have recently been opened and are marked with colored backgrounds. Files that have already been attached have a yellow background, files that have not yet been attached have a white background. Links to external systems have a blue background (the blue entries in a list exist only for one Normfall "session").

If the file that you would like to attach is of a document type for which target-specific reference is supported, the field **Target within document** will be visible in the next row.

Target within document

Some types of documents can be attached to a structure node using a specific target. This is facilitated by plug-ins. Sometimes, however, it is useful or necessary to set this setting here or later in the detail view  "by hand". To do so, select the corresponding target type (e.g. "page") from the list under **Target within document** and enter the desired page number. The next time you open this file with Normfall Manager the document will open directly to the given page so that you do not have to page through the document to find the passage that you are looking for.

If you call up the attach box from a plug-in, the target is usually displayed by default; you can, however, change it. A target has already been created by the plug-in at this point and cannot be reversed.

An example: If text is selected, the Word plug-in creates a bookmark, the Acrobat plug-in an emphasis.



Date

When attaching a file the date of the last change to the file will automatically be used here. E-mails that are attached by plug-in are automatically assigned to their send or receive dates; any file attachments to the e-mail will be marked with the date of the e-mail.

You can assign to a reference a given date by entering it by hand or by clicking on the arrow symbol which displays a calendar from which you can select a date.

Title

By default the complete file name will be displayed in the field **Title**, but can be replaced by another title.

Notes

When attaching from a Word document, the Normfall PDF Editor or an e-mail, the text (which, if necessary, must previously be selected by dragging it) is automatically copied into the text editor and locked for editing (however, it is possible to mark passages by using the **Highlight** button). This is indicated by the grey shaded text editor area. Use the **Change to Comment** button to write your own comments.

Change to Comment

Click on the **Change to Comment** button to enter your own comments on attached files in the **Notes** field. The notes field will then be unlocked so that you can add your own comments into the text editor. For this purpose, a text editor with formatting functions  is available.

Browse

Click on **Browse** to choose a file from your hard drive, a connected piece of equipment or another computer (file server).

Attaching a reference

If you have selected a file you can attach it to one or more structure nodes simultaneously. To do so, place a check in front of the corresponding structure node, to which you would like to

attach the file (in the structure view to the left).

On the right side of the bottom window of the attach box there is, in addition to the buttons **Remove all** and **Attach**, a field with the list of all structure nodes, that you have already selected. This list remains intact until your next reference. This allows you to select new subnodes for a reference under the same structure nodes (such as, for example, "contacts" or "people") by clicking on the (X) behind the corresponding node in the list. In the structure view the structure node on the level above the current node will be selected and the check at the subnode of the last attachment will be removed. In this way you can quickly navigate between structure nodes to which you would like to regularly attach files.

Individual checks on the left side of the structure can be removed manually. Click on **Remove all**, if a file should not be attached to any of the selected structure nodes and you would like to make an entirely new selection.

If you have selected all desired structure nodes for a reference, click on **Attach**. The attach box will then close and the reference will be created.

The Attach Box in Relation Mode

With the relation mode set in the current project, additional functions are available. You can find more information on this topic in the chapter The Attach Box in Relation Mode^[119].

Attaching from External Systems

Normfall Manager is generally capable of attaching documents from external systems, such as document management systems (DMS) and articles from online databases.

Which external systems are supported can be found on our homepage www.normfall.com, or by contacting our support (see our homepage).

As this user manual was created, support was as follows:

Direct Support:

- Juris databases^[79]
- Exchange Server using Outlook^[65]

Indirect Support:

- WebDAV, particularly Microsoft SharePoint Services, using drive mapping from Windows.
- All systems on which documents can be referred to using URLs^[81].

Juris Documents (for Users based in Germany)

Juris is the legal information system for the Federal Republic of Germany belonging to juris GmbH in Saarbrücken.

You can easily attach documents which you have researched there to corresponding structure nodes of a Normfall project. With a click of the mouse you can open the documents again in the Internet.

To do so, you need a valid Juris account and Microsoft Internet Explorer. (For other browsers see the section Attaching with other Browsers⁸⁰⁾.)

In the **Tools | Options | Juris** menu you can deactivate the option **Enable references to Juris DBs** if you do not want to attach Juris references. Then, the juris button will be hidden in the Normfall Manager toolbar.

Saving Juris Access Data in Normfall Manager

You can **save** your Juris access data in Normfall Manager so that you do not have to enter them on the Juris home page.



To do so, execute the **Options** command in the **Tools** menu. Click on the point **Juris** in the dialog box which will open, enter your Juris access data, activate **Remember Password** and confirm your entries by clicking on **OK**.

Attaching with Internet Explorer

Before your juris research, click on the **Juris** icon in the toolbar of Normfall Manager (below the menu bar).



If you have saved your access data, Microsoft Internet Explorer will open the Juris web page where you are already logged into your user account. Otherwise, the Juris web page will open and you will be required to enter your Juris identification including password.

Now, you can research with Juris. If you have found a document which you want to attach to your project, use the toolbar commands of the Plug-ins for Internet Explorer⁷²⁾. Here, "Juris" with the option **Copy local** is already pre-defined as reference type. With this setting, a juris document is saved and attached in pdf format.

Normfall Manager

1.) By clicking on this button, the attach box will open.

In the **Document** field you find the name of the Juris document to be attached. The Juris document number is selected as **Target within the document**.

2.) Select the corresponding nodes to which the document should be attached in the structure view.

3.) Click on **Attach** in the attach box.

To Row

Select this command if you have already selected a node in your structure and wish to attach the Juris document to this structure node.

To Node

For the purpose of pasting a Juris document as a new structure node to the project, click on **To Node**. Normfall Manager then pastes the file as a subnode of the currently selected structure node.

If you double click on the attached document in the corresponding reference row, the document will be displayed with a pdf viewer (in case you attached it offline as a local copy), or Microsoft Internet Explorer as well as the attached juris document will automatically open through your Juris account (if you attached the document as an online version).

Attaching with other Browsers

If you use a browser other than Microsoft Internet Explorer (e.g. Mozilla Firefox, Netscape or Opera) by default the automatic login described above is not possible.

In this case, proceed in the following manner:

1. Open the juris document which you wish to attach in your browser.
2. Then copy the number of the document to the clipboard (e.g. by selecting the number and then pressing the key combination **Ctrl + c**).

The document ID corresponds to the scheme "id=XYZ00000" and can be found in the address line of your browser:

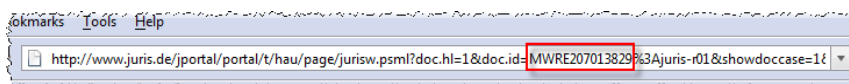


Fig.: A juris document ID in the browser address line

3. Create a new reference row in Normfall Manager by clicking on **New Annotation** in the list view.
4. Click on **Attach juris Doc** in the detail view.

A dialog box will open into which you can enter the document number from the clipboard (e.g. by means of the key combination **Ctrl + v**).

To open your attached references to juris documents with your default browser it is necessary to activate in the menu **Tools|Options** under the juris setting **Use default browser to open linked documents (no automatic log-in)**.

Attach URL

The abbreviation URL stands for **U**niform **R**esource **L**ocator and represents exact addresses in the Internet.



In the Internet you find various forms of information, such as legally relevant information, e.g. standards, court decisions as well as all kind of data. You will often wish to save existing research results. Normfall Manager allows you to do this easily.

In order to refer to a web page in the Internet, create a new empty row to the list view. To do so, click on **New Annotation**.

Then click on **Attach URL**. In the following dialog box you are requested to enter the desired URL you would like to refer to.

If the desired web page is currently open in your browser, select and copy it using the key combination **Ctrl + c** and paste it with **Ctrl + v** to the input row. Confirm by clicking on **OK**.

In the reference list, you recognize the URL reference by the following icon: 

In the title column, the URL appears as the title of the reference.

4.3.3 Editing Attached Documents

Generally, you can edit a document by selecting the command View Document^[135] from the context menu of the list view, then editing the open document and saving it normally.

If you want to record the **state of editing** by means of continuous copies of the document, use the following procedure after editing an attached document:

1. Select **"Save as"** in the file menu of the corresponding application.
2. Select your Inbox folder^[54] as the location and select a new filename, e.g. Document_2008_03_18.
3. Switch to the Normfall application window and attach the document again using the **Move File** command found in the **File Inbox** tab.

4.4 Converting Structured Text Documents

4.4.1 Creating a Normfall Structure from a Word Document

You can convert a Word document to a **new Normfall structure** or paste it as a **branch to an existing project file**. To do this, an outline of the document with uniform Word formatting is necessary. The headings of the outline are converted to structure nodes of the Normfall structure depending on their outline-depth. The flowing text of the document will be inserted into the comment editor of each structure node.

To read a Word document into a project file you can use any of the following three commands: **New from Word document**, **Insert**

from **Microsoft Word** and **To Structure** (found on the plug-in for Microsoft Word).

*It is recommended to show bookmarks in Microsoft Word. To do so, refer to the Tools | Options | View menu and check the **Bookmarks** checkbox.*



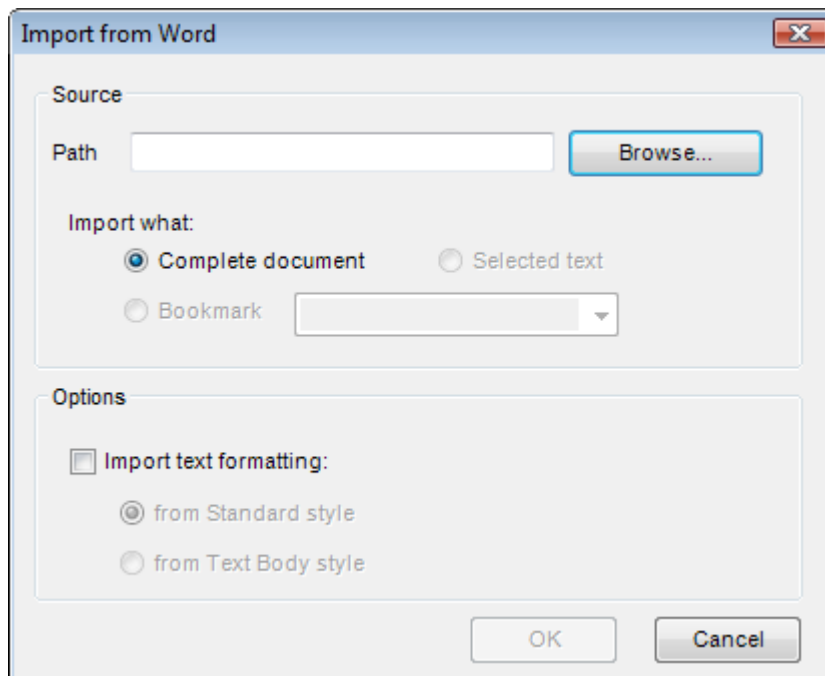
New from Word Document



You will find this command in the **File** menu. It allows you to create a structure of a **new** Normfall project out of an outlined Word document.

If a project file is not loaded you can also click on the corresponding button found in the toolbar.

The following dialog box will appear:



1) Click on **Browse** under "Source" to select the Word file that you would like to convert.

You can determine whether the complete document, selected text or a section based on a given bookmark should be converted.

2) Select the text formatting that should be used under "Options".

3) Confirm by clicking on **OK**.

4) Choose where the new project should be created in the next window. You can choose between a file system and a SQL Server.

Creating a new project file on a file system

Click on **File** to define the name and save location of the project file that you would like to create in the next dialog box.

You can also select an existing project file. This will then be overwritten during the input process.

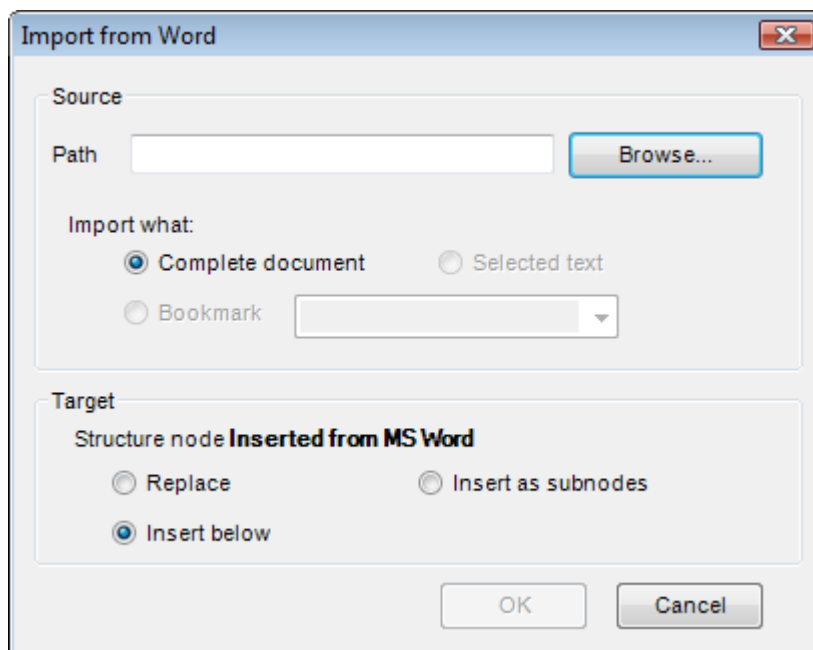


Creating a new project on a SQL-Server

Click on **Server** to create a new project on a database server. Further information can be found in the chapter Working with a database Server^[112].

Insert from Microsoft Word

Use this command found in the **Structure** menu to insert an outlined Word document to an **existing project file**:



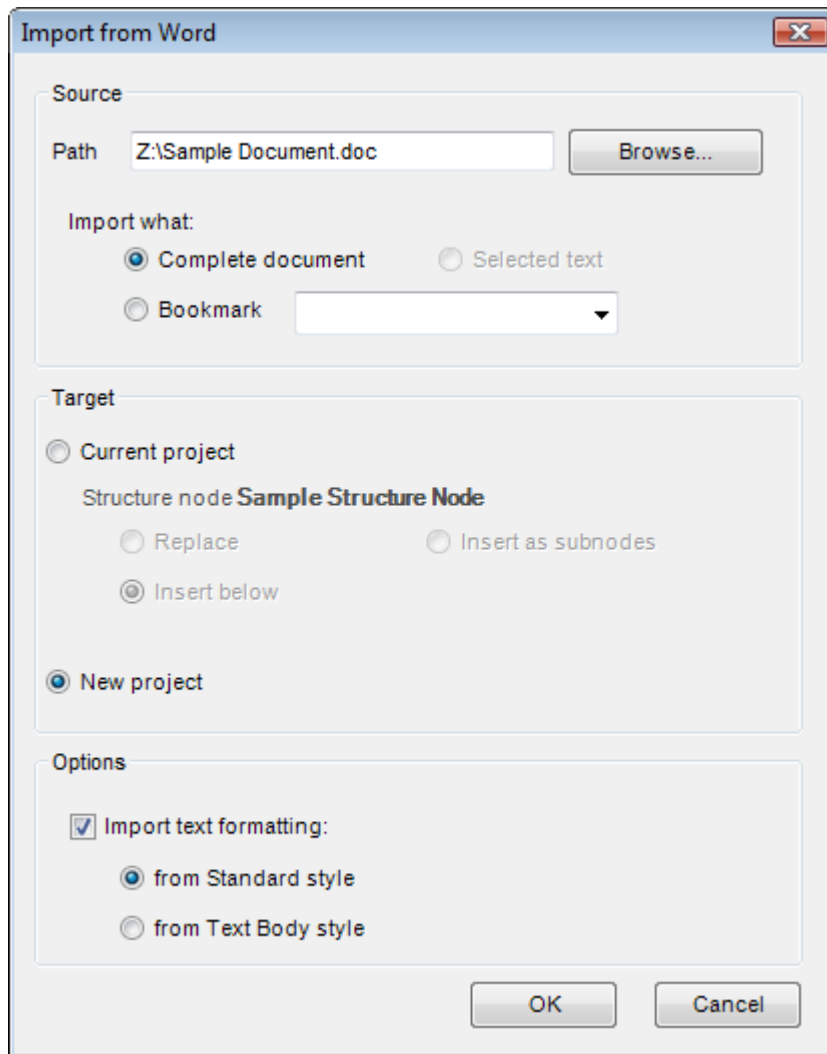
1) Click on **Browse** under "Source" to select the Word file that you would like to convert. You can determine whether the complete document, selected text or a section based on a given bookmark should be converted.

2) Under "Target" you can determine whether the text that you would like to insert should replace the currently selected structure node, be inserted below or as a subnode of the currently selected structure node.

To Structure (found on the plug-in for Microsoft Word)

Using the plug-in a project file can be directly created from Word. Click on the command **To Structure** found in the toolbar to do so.

The following dialog box will appear:



Under "Source" the path of the file that is currently open in Word will be displayed.

You can set several settings here, just as found under the topic New from Word document^[82].

If a **new project** should be created, click on the corresponding Radio Button^[170] and confirm with OK. The selection dialog box will open again in which you can determine whether a project file on your file system^[82] or a project on a server^[83] should be created.

4.4.2 Creating a Document out of a Normfall Structure

Normfall Manager allows you to create Word documents or html files from entire or partial structures. Outlined files with all structure levels will be created which can be edited further with the commands of Microsoft Word. Using an html file you can first see how a Normfall structure appears as flowing text.

This function is also available for partial structures.

Convert to Document

To convert a partial structure to a document, click on the corresponding structure node with the right mouse button and select the command **Convert to Document** from the context menu.

The individual functions will be explained in the next section.

Convert to Document

To convert the entire structure to html format or to a Word document, select the command **Convert to Document** found in the **File** menu.

*To fully deploy the following options, it is recommended to show bookmarks in Microsoft Word. To do so, refer to the **Tools | Options | View** menu and check the **Bookmarks** checkbox.*



Create Document From Structure

File format

- ☐ Quick View
- ☐ HTML
- ☒ Microsoft Word

Selection

- ☒ Whole Project
- ☐ Selected nodes

Target

- ☒ New document
- ☐ Existing Word document

Path:

Bookmark

Bookmark name:

Existing bookmarks:

Options

Initial heading level:

- ☒ Include notes
- ☒ Include rows (as hyperlinks)
- ☒ Open document when finished
- ☒ Apply text styles

Relation: Auszugebende Bänder

☒ 1 Plaintiff ☒ 2 Defendant ☒ 3 Verdict

☐ Nur Konflikte anzeigen (Einträge in mind. zwei Bändern)

Fig.: Dialog "Create Document from Structure" with the option "Microsoft Word" set.

If the option "Microsoft Word" is selected, the following settings can be set here (if the selected output format is html, non required options are hidden):

File format

Here you can determine the format of your target file. You can choose between an html or Word file.

Selection

Depending on which command you have executed, a selection is pre-defined so that either the **whole project** or the currently **selected nodes** will be converted. This setting can also be manually altered.

Target

If the file format **html** is selected a new document will automatically be created. Click on **Browse** to define the save location and name of the file.

If a **Word document** is to be created you have the option of selecting a new document that is yet to be created or a pre-existing document.

- o **New document**

A new Word document will automatically be created. As soon as you have set all settings and clicked on **OK**, a **Save as dialog box** will appear with which you can save the new document.

- o **Existing Word document**

Click on **Browse** to open the file into which you would like to insert the document that you wish to convert.

Path

By clicking on **Browse** you can open a pre-existing document or save a new document that you would like to create.

Bookmark (only available when converting to an existing Word document)

When converting to a Word document the entire text will be marked with a bookmark; in the text box **Bookmark name** either the name of your project file or the name of the currently selected structure node will appear, provided that only a partial structure should be converted. Using this name, which you can freely alter, you can directly open the Word document to the given passage.

If you have an **existing document** set as the target, you can determine to which location of the document the (partial) structure that you would like to convert should be inserted. As soon as the existing document contains bookmarks, they will be listed under **Existing bookmarks**. Select the desired bookmark from the drop-down list and then click on one of the following option fields:

- o **Insert before this bookmark**

- o **Insert after this bookmark**
- o **Replace this bookmark**

For the command

- o **Add to end of document**

it is not necessary to have selected an existing bookmark. The created text will then be inserted at the end of the Word document.

Options

Under **Initial heading level** you can determine with which heading level the formatting of the structure nodes should begin in Word. Selecting, for example, "4" as the initial heading level, will format all structure nodes of the first level in your Word document using the "heading 4" style. All subnodes on the next level will have the formatting "heading 5", etc.

To use the following options, place a check in the given check boxes:

- o **Include notes**

This setting converts the notes of each structure node to the Word document along with the structure.

- o **Open document when finished**

Opens the created document directly after the conversion process.

- o **Include rows (as hyperlinks)**

This option converts all references to hyperlinks in the Word document, which you can click on to open the attached document. Additionally, all comment rows will be converted.

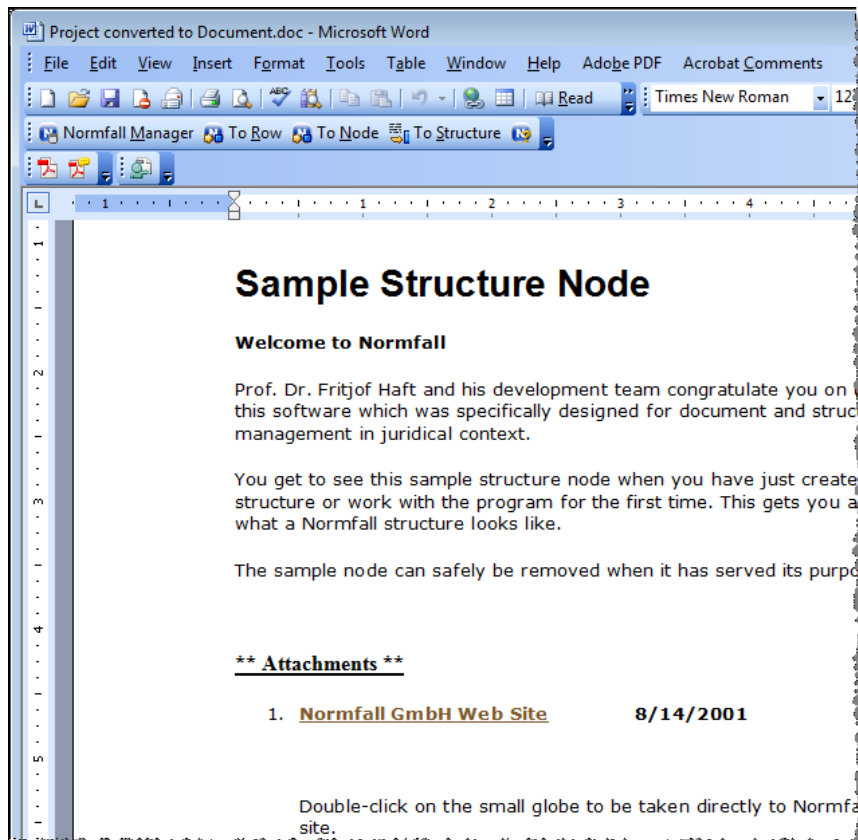


Abb.: The beginning of a structure that has been converted to a Word document

*Please note that links refer to documents in your project folder. If the converted Word or html document is opened on **another** computer, the references will be lost.*



o Apply text styles

This option is only available when a new document is selected as the target.

Relation: Select Tracks

If in the current project the relation mode is set, it is possible to select the tracks which you like to be converted into a document. More information on the Relation Mode can be found here.

The option **Conflicts only (entries in at least two tracks)** allows you to limit the conversion to those nodes which show entries in various tracks in order to obtain an overview of the related contents.

4.5 Text Editing

Normfall Manager 4 provides you with a text editor in the detail view^[34] with its own toolbar^[172] for formatting text.

Default text settings

In these settings you can define a default formatting (font type and size, etc.), which is valid for the entire project. In each comment editor, the text entered will automatically be formatted according to these criteria unless you apply direct formatting in the comment editor. How to set this setting can be found in the chapter [Commands in the Tools Menu | Text Options](#)^[140].

Direct Formatting

A direct formatting is a formatting that you apply directly in the comment editor. For such formatting you have a toolbar, which you are familiar with from other text editing programs. This allows you to, for example, edit the font type and size, add bold or italic text, set the alignment to left or right, create lists, etc.

Likewise you can create hyperlinks to web pages and remove previously applied direct formatting.

If you change the default text settings at a later time, your previously applied individual formatting within the comment editor remains unchanged.

This is also valid for formatting that "comes with" text that you have pasted from other applications. You can avoid this by selecting the command **Paste with editable formatting** from the context menu. For more details on pasting text to the editor see [Paste Options of the Text Editor](#)^[89].

If you apply text formatting directly using the toolbar of the comment editor, the text no longer "reacts" to changes made to the default text settings (with regard to the given setting, e.g. font type).



The Remove Formatting command from the toolbar reformats the text according to the default text settings.

Zoom Function

The size of the text editor can be enlarged or reduced using the two magnifying glass symbols found in the toolbar of the text editor. Alternatively, you can execute these commands using the context menu by right clicking in the comment editor.

Print Function

You can print the text of the comment editor using the context menu. Likewise, you can use the command **Print Current Text** from the **File** menu. For more on this function click here^[126].

4.5.1 Paste Options of the Text Editor

Pasting with the context menu

To paste formatted text to the detail view, for example from Microsoft Word or a web page, you have three commands

available in the **context menu**:

Paste with original formatting

Select this option to receive an exact copy of the original text. It is possible, however, that some formatting has been included in the pasting process that is later not editable using the editor.

Formatting that is not copied directly from the source application (e.g. Word) - because it corresponds to the default settings of Word - will be replaced by the default text settings^[140] of the editor.

Only select this type of paste if you do not want to make changes to the pasted text later.



Paste with editable formatting (recommended):

The formatting of the text copied with this command can be edited using the commands of the text editor. Formatting that cannot be edited with the editor will be removed.

Formatting that is not copied directly from the source application (e.g. Word) - because it corresponds to the default settings of Word - will be replaced by the default text settings^[140] of the editor.

Select this type of paste if you would like to use the existing formatting, but would also like to edit the text.



Paste as plain text:

The original formatting will be removed. Sometimes editors from which you copy text include, for example, the font type formatting.

Select this type of paste if you want to avoid direct formatting such as font type. The text pasted in this manner will be edited according to your default text settings^[140].



Paste with Ctrl + v

In the menu **Tools | Options | Other** you can determine which of the three commands from above should be executed when using the key combination **Ctrl + v**.

4.6 Move and Copy Operations

In this chapter the functions will be explained that you can execute by pulling with the mouse^[174] (drag & drop) or by using the clipboard (copy & paste).

4.6.1 Attaching Files by Pulling onto a Normfall Project with the Mouse

Normfall Manager allows you to attach any files or even folders from Windows Explorer to structure nodes using "drag & drop". Similarly, it is possible to attach elements from Microsoft Outlook to the desired structure nodes or copy them to the list view. Doing this will copy the files to the auto folder. (You can find more detailed information in the section [Folders](#)⁵².) The target structure node under your cursor will be denoted by a colored background.

1. Position the Normfall Manager window and the Windows Explorer window next to each other so that both can be seen on the screen.
2. Click on the file to be attached, pull it to the desired structure node and release the mouse button. The file will be attached as a new reference.

If you do not wish to position the Normfall Manager application window next to the Windows Explorer window, proceed as follows:

1. Minimize the Normfall Manager window and open Windows Explorer.
2. Click on the file to be attached, pull it onto the minimized Normfall window and wait a short moment until the Normfall window appears in the foreground.
3. Place the file to be attached on the desired structure node.

This command also works in the opposite direction: to move files from the list view of Normfall Manager to Windows Explorer, pull them as described above to the desired folder.

4.6.2 Drag & Drop in a Normfall Project

Using Drag & Drop you can copy or move structure nodes with all subnodes and references as well as reference rows in a Normfall structure. The command is also available in all list views so that, for example, even files listed under the tab **Recent Docs (Project)** or **Recent Docs (System)** can be pulled to the desired structure nodes. Additionally, you can directly attach files from Windows Explorer or elements from Microsoft Outlook to individual structure nodes or "pull" them into the file inbox. To do so the **File Inbox** tab has to be in the foreground.

You can move structure nodes by clicking on them and pulling them to the desired structure node while holding the mouse button. When you release the mouse button on the target, the pulled structure node will be cut and inserted on the same level under the target node.

- If you press and hold the **Alt key** while pulling, the node will be inserted as a subnode.

- If you press and hold the **Control key (Ctrl)**, the pulled node will not be moved, but rather copied.
- If you press and hold the **Shift** key while pulling, the structure node will be inserted as a shared copy^[97] on the same level.

You can also combine the keys mentioned above:

- If you press and hold the **Control key (Ctrl)** and the **Shift** key while pulling, a shortcut^[97] will be created.
- In order to create a hyperlink^[98], it is necessary to press and hold the **Control key (Ctrl)**, the **Shift** key as well as the **Alt** key while pulling.

Further information on shared copies, shortcuts and hyperlinks can be found here^[96].

- You can move reference rows by clicking on them and pulling them to the desired structure node with the mouse button pressed. If you press and hold the **Control key (Ctrl)** while pulling, the reference rows will not be moved, but rather copied.

4.6.3 Inserting Contents with "Copy & Paste"

The "copy & paste" function is available at any location in Normfall Manager where you can edit or insert contents; this includes all list views as well. In this way it is possible, for example, to copy text passages from Word documents to the text editor of the detail view or from there to written work or the like. Similarly, you can, for example, attach elements from Microsoft Outlook to structure nodes or copy them to the different list views.

To do so, select the desired text and copy it using the key combination **Ctrl + c**. Insert it to the desired location using **Ctrl + v**.

Further information on the paste options^[92] can be found in the corresponding chapter.

Using this command you can also copy files of the reference list to any folders of Windows Explorer: Select and copy the desired rows in the list view and afterward paste them to the desired folder in Windows Explorer.

 **Ctrl+ c**

 **Ctrl+ v**

4.6.4 Paste Options

After cutting out or copying structure nodes, reference rows and text passages these elements are moved to the clipboard^[176]. There are several options that allow you to insert the objects at another location. You can, for example, create shared content locations^[97] or shortcuts^[97] (see the chapter Further Structure Functions^[96]) from the individual elements or paste them as subnodes or new root structure nodes. In creating your structure you are free to choose the organization of information and can easily adapt your structure to new developments and changes in the data.

Elements that have been copied or cut out can also be pasted to **other projects**, that is from Project A to Project B. To do so, both projects must be **open simultaneously**.

Any attached files will also be copied. Provided that there are already references to these files available at the target location a dialog box will appear which you can use to determine whether these references should be overwritten or whether the reference should point to the existing files.

Paste Options of the Structure View

Structure nodes and reference rows that have been cut or copied are moved to the clipboard^[176] and can be pasted into your structure in several ways. You can choose to which location of the structure the nodes should be pasted:

1. on the first level
2. on the same level
3. as a subnode of another structure node

Additionally you can determine as what type of data the structure nodes should be pasted:

Copy: The given structure nodes will be copied and pasted with all references.

Shared content location: The given structure nodes will be copied and pasted with all references and converted into shared content locations.

Shortcut: The given structure nodes will be copied and pasted with all references and will then refer to another structure node.

Hyperlink: The given structure nodes will be pasted as hyperlinks, which refer to the corresponding nodes.

Explanations to the terms shared content location^[97], shortcut^[97] and hyperlink^[98] can be found in the section further structure functions^[96].

Please note the following information when pasting elements as hyperlinks:

*Depending on the location where you open the context menu to execute the command **Paste as Hyperlink** the copied element will either be pasted as a structure node in the structure view or as a row in the list view.*



Paste on the First Level

With this option structure nodes that have already been cut out or copied will be pasted to the last position of the first level of your structure. Open the context menu^[167] by right clicking^[174] on the white area of the structure view and select either the command **Paste on the first level** in order to create a simple copy or select in the submenu **Paste Special** one of the options in order to create a **Shared Content Location on the first level**, **Shortcut on the first**

level or a **Hyperlink** on the first level.

Paste to the Same Level



To paste a structure node that has been cut out or copied to a position directly under a target structure node on the same level, click on the desired structure node and execute the command **Paste** from the **Edit** menu.

Alternatively you can use the key combination **Ctrl + v**.

To determine as what type of data the structure nodes should be pasted, use the context menu as described above and select there the command **Paste node** or one of the paste options to create a shared content location, a shortcut or a hyperlink from the submenu **Paste Special**.

Paste as Subnode(s)

To paste copied or cut out structure nodes as subnodes of another node, open the context menu of the target structure node by right clicking and select one of the paste options to create a shared content location, a shortcut or a hyperlink from the submenu **Paste as Subnode(s)**.

Pasting Reference Rows



Likewise, you can paste rows that you have cut out of or copied from your reference list to other structure nodes.

To do so, click on the target structure node and then execute the command **Paste** from the **Edit** menu.

Alternatively, you can use the key combination **Ctrl + v**.

In order to paste reference rows as shared content locations, shortcuts or hyperlinks, use the context menu and select there the desired option from the submenu **Paste Special**.

Please note that reference rows that are pasted as a shortcut cannot be commented in the comment editor since they simply refer to the original. You can only add notes in the comment editor to the original row!



Paste Options of the List View

The list view contains all documents and files that you have attached to a certain structure node. Similar to your structure, you can form your reference list as desired and take changes to data into consideration here. Therefore you have the possibility to cut out or copy rows from the reference list; these are then moved to the clipboard¹⁷⁶ and can be pasted to other structure nodes. Depending on whether you use the **Paste** command from the **Edit** menu or the context menu, there will be different commands available.

Pasting Reference Rows

**Ctrl + v**

You can paste rows that you have cut out or copied from your reference list to other structure nodes in your structure.

To do so, click on the target structure node and then execute the command **Paste** from the **Edit** menu.

Alternatively, you can use the key combination **Ctrl + v**.

Paste Special

Here you can determine as what type of data the reference rows should be pasted:

Paste Row: The given rows will be copied and pasted to another node.

Shared Row: The given rows will be copied, pasted and converted to shared content locations.

Shortcut: The given rows will be copied and pasted and will then refer to other rows of another structure node.

Hyperlink: The given rows will be pasted as hyperlinks, which refer to the given rows.

Please note that reference rows that are pasted as a shortcut cannot be commented in the comment editor since they simply refer to the original. You can only add notes in the comment editor to the original row!



You can execute the paste options described above by using the context menu:

1. Copy or cut out the given reference rows.
2. Click on the desired target structure node with the right mouse button.
3. Select one of the following commands from the context menu or respectively there from the submenu **Paste Special**:

- **Paste Row**
- **Paste as Shared Row**
- **Paste as Shortcut**
- **Paste as Hyperlink**

Please note the following information when pasting elements as hyperlinks:

*Depending on the location where you open the context menu to execute the command **Paste as Hyperlink** the copied element will either be pasted as a structure node in the structure view or as a row in*



the list view.

4.7 Further Structuring Functions

Normfall Manager 4 offers you extensive possibilities to structure contents.

The basis is the structure  on the left side, to which documents or locations within documents can be attached in the reference list  to the right.

The individual rows of the reference list are called reference rows . They can however do much more than simply represent a reference.

The first entry of the reference list is always a row that represents the current structure node. Further rows are attached documents. You can also create empty rows for notes. For each row there is a detail view in which you can add text to the given row.

In this section you will be introduced to further functions that can be used to work with structure nodes and reference rows.

- Convert  reference rows to structure nodes showing the document icon in the structure or convert structure nodes to empty reference rows for notes.
- Create shared content locations  of structure nodes or reference rows such that the changes made in the detail view can be transferred to all copies.
- Create shortcuts  with structure nodes or reference rows to refer to another branch of the structure.
- Create hyperlinks  to refer to structure nodes in other projects or to refer to a structure node from the running text (in the detail view or from another application, e.g. e-mail).

4.7.1 Converting Rows

Since documents and notes can principally be added to structure nodes or to reference rows, it is not clear which option should be preferred. In case of a longer list of short notes, empty reference rows can be more useful than structure nodes. Nevertheless, what happens if you change your opinion while creating the structure? Then, you need the following functions for the conversion.

Converting rows to structure nodes

The Convert to Node  command allows you to convert reference rows selected in the list view to structure nodes.

In this context, the rows are pasted as subnodes of the current structure node. If the row refers to a document, the icon of the document appears in the structure. Then you can add subnodes and reference rows for the document which it represents, e.g. text passages in the document or metadata (author, keywords).

Converting structure nodes to rows

The Convert to Row^[133] command allows you to convert structure nodes selected in the structure view to reference rows.

Structure nodes subjected to this command are pasted as rows of their mother node. If a structure node contains subnodes or reference rows, they become "subrows". Since the list view supports only one level of subrows conversions which require further levels cannot be executed.

Normal structure nodes which do not represent a document thus become empty rows for notes.

4.7.2 Shared Content Locations

During your daily work, it is possible that a document is relevant for several structure nodes and that you wish to attach it simultaneously to these nodes. Imagine, for example, a written document which is important both for the structure node "Author" and for the node "Correspondence".

Likewise, a branch of your structure can be important at another location such that you want to paste this branch at this location. In such cases you create a so-called Shared Content Location of documents or branches. These Shared Content Locations represent a group of elements which are permanently synchronized such that e.g. each note which you edit for a document appears automatically in the comment editor of all shared content locations of this document and is updated if changed later.

There are several ways to create shared content locations. In the case of a document which you wish to attach several times we recommend you to use the Attach Box. For further information on the Attach Box, please refer to the chapter Attaching Documents^[57].

In order to paste structure nodes as shared content locations, copy them and use the commands described in the chapter Paste Options^[92].

Note that the subnodes of a structure node will not be copied and pasted again. In order to avoid this, use the Shortcut^[97] function which offers you the possibility of showing one and the same branch at several locations in the structure.



A group of elements synchronized in this way will lose its shared content location status when the second to last element of the group is deleted and thus there are no more existing elements that need to be synchronized. In this case it is not important whether the "original" or a copy thereof remains.

4.7.3 Shortcuts

Unlike shared content locations^[97], shortcuts allow you to refer to other documents or structure nodes. It is possible to add shortcuts to structure nodes if, e.g. you wish to define overlapping groups of persons within your structure. Your structure already contains a list of persons and each person is

represented by its own structure node (e.g. the structure node "Persons" includes the subnodes "Smith", "Meyer", etc.). To group people according to certain criteria or assign them to other structure nodes, create further structure nodes (e.g. "Experts", "Witnesses", etc.) and paste shortcuts to the names listed under "Persons" as subnodes of these nodes.

Or: You would like to list all participants of a conference in an existing project. To do so, create a new structure node (e.g. "Minutes") and paste all persons which have participated in the conference as shortcut under this structure node.

For detailed information, please refer to the chapter Paste Options^[92].

Since shortcuts always refer to an original, please note the following aspects:

- If you delete the original, all shortcuts belonging to it will be deleted! Keep this fact in mind whenever you execute a deletion. In order to avoid this, use the function of Shared Content Locations^[97].
- If you change the original, e.g. by changing its name or pasting subnodes, the shortcuts will also change.
- Shortcuts always show the references and subnodes of the original.

4.7.4 Hyperlinks

Generally spoken, a hyperlink, also called a link, is a reference to another document within a hypertext which can automatically be tracked through the "hyper text system". The concept of hyperlinks corresponds to cross references or footnotes known from conventional literature where the reference target, however, must be searched manually.

Normfall Manager allows you to create cross references within your structure via hyperlinks. To do so, copy, for example, structure nodes and rows and paste them to another location using the **Paste as Hyperlink** command. For more detailed information, please refer to the section Paste Options^[92]. Whether the hyperlink will be pasted as a structure node in the structure view or as a row in the reference list, depends on the location where the context menu is opened.

Hyperlinks allow you also to refer to structure nodes and rows in other project files. The "Target" of the hyperlink is always the original, i.e. the element copied; furthermore, hyperlinks contain information on which project file they belong to. If, for example, you wish to copy two structure nodes S1 and S2 from project A to project B, wherein S2 refers to S1 via a hyperlink, the hyperlink in project B will not refer to the node S1 in project B but rather to the node S1 in the original project, A.

Furthermore, it is possible to paste hyperlinks as text in an editor which supports hyperlinks such as the text editor of Normfall Manager, Microsoft Word or e-mail editors. By clicking on structure nodes or rows, they can be pasted to the text editor using the **Paste with original formatting** command from the

context menu. In other applications, use the corresponding paste commands or, alternatively, the key combination **Ctrl + v**.

Thus, it is possible to paste links to certain structure nodes as "bookmarks" in Word documents.

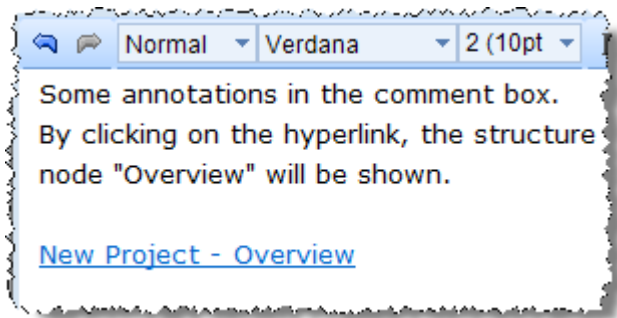


Fig.: Hyperlink in the text editor of Normfall Manager.

Please check when pasting links to e-mail messages, that you have selected the message format html (Hypertext Markup Language) since the link will not function otherwise. For further information on setting the message format, please refer to the help function of your e-mail program.



In order to enable hyperlink functionality, each project file requires a unique name. Normfall Manager will create this name automatically when creating a new project; it consists of a long identification number to which the hyperlink will refer. The **Properties** command in the **File** menu, however, allow to enter an alternative name (descriptive name).

The number should be changed either when creating a new project or when no hyperlinks have been created in a project yet. If hyperlinks already exist they are lost when the project ID is altered!



For further information, please refer to the chapter Project Properties¹²⁶.

4.7.5 Node Types

A new structure node is always represented by a blue square. However, you can create an optical distinction between nodes by assigning other colors and specific icons. This is done by assigning a type to a node. A node type always consists of an icon and a type name which will be displayed when moving the mouse pointer to the concerned structure node.

Normfall Manager comes with a **built-in** package of colored structure nodes and icons, but you can also use **your own icons** which should best be available as icon (.ico) files with 16 x 16 pixels. However, nearly every other image file format is supported.

Example of use:

Usually, many people are involved in a law case. These people

can be grouped, e.g., into defense counsels, defendants, witnesses, experts, and so on. Thus, in your project there are structure nodes named "Defense counsels", "Defendants", "Witnesses" etc. Now you can assign a certain node type to each of these nodes; in this case it would be advisable to assign the type "Person" which should be represented by an appropriate icon (e.g. a man icon).

Assigning the type

In order to assign a specific type to one or more nodes you can either use the built-in types provided by Normfall Manager or your own icons. To do so, select the concerned structure nodes with the mouse and then choose the **Change type** command found in the **Structure** menu. Alternatively you can also use the key combination **Ctrl + k** or call up the context menu. Subsequently a list of all available node types will be displayed from which you can choose the desired type by clicking on it or by entering the respective (numeric) character belonging to the node type by means of the keyboard (e.g. "2" to assign the red type).

Change Type



Using built-in types

Follow the instructions as described above under "Assigning the type" in order to select the desired type from the list of built-in types.

Using custom types

If you would like to use your own types in addition to the built-in types, the image files must be saved in a specific folder within your file system and given the name of the node type that you wish them to represent. This folder may contain several subfolders.

To make icons used in a project available to other users, they are automatically copied to the project folder when you assign them to a node. They can be found in the "_Icons" folder of a project.

Note: *You can copy icons directly to a project's _Icons folder if you want to define node types that are unique to this project.*

If one or more users wish to use the same set of node types on multiple projects, the image files must be saved in a special folder available to all those users; this folder can be selected in the Tools | Options | Folders menu. Please also refer to chapter Tools | Options | Folders.

In order to assign a user-defined icon to a structure node, select the node by right clicking and choose the desired icon from the list displayed under **Change type**.

Note: Changes within the icon folder have direct effects on the node types used in all concerned projects.



When you replace an icon with another one within an image folder, the icon will also be replaced in the structure view of the concerned projects.

When you delete an icon from the folder, the concerned node type will “lose” its icon and be represented by the standard blue node.

Renaming or moving an icon to another subfolder has the same effect on the node type as deleting the icon and defining a new node type.

4.8 Searching and Finding

The more complex a project is, the more difficult it becomes to find certain information or nodes. Normfall Manager therefore offers you comfortable search functions with which you can search your project data quickly.

4.8.1 Find in Project

With this command you can search all structure nodes, reference rows and comments in your Normfall structure for certain terms. It also allows you to search the full text of all attached documents. You can also limit the search to the structure nodes or the reference rows or you can define a certain period of time as search criteria. To do so use the command **Find in Project** or the key combination **Ctrl + s**. On the right side of the list view the **New Search** tab will then appear.

 Find in Project

 Ctrl + s

In the field **Find what** you can enter your search term(s). You also have several search options available.

Selecting the option **All Words** will display all search results in which all terms that you have entered into the search field (in any order) are found. Words should be thought of as character strings, each of which is separated from others by an empty space. To be displayed as a search result, the location only has to contain a part of each character string that you have entered into the field.

The option **Any Words** returns all search results that contain at least one of the words entered into the search field. It is sufficient that a part of the character strings entered into the search field is found.

The option **Exact Phrase** returns all search results containing the exact character string, with empty spaces, that is entered into the search field.

The option **Whole Words Only** returns only results that match the entire words searched for.

To run a full text search throughout the entire project and within all attached documents, select the option **In Documents**. Please note that to do so it is required that Microsoft Indexing Service is activated on your operating system. With this setting (**In Documents**) the option **Whole Words Only** is presumed to be activated. However, additional search results which may be found **within the structure** follow the user's individual settings.

Activate the check mark concerning **Reference rows** in order to search for terms in the reference list.

If you would like to search for results based on date, place a check mark in the box **From**, which allows you to select dates from the calendar between which you would like to search.

The search results will be displayed as a list which you can sort by ascending or descending order by date or title of the document. To do so, click on the heading Date or Title.

The structure node to which the search result belongs will be marked with a colored background, if you click on an individual row in the search result list. The currently selected structure node in the structure view will likewise remain colored.

After the search, you will have the following commands available in the toolbar:

- **Locate**^[161]: The given file will be shown along with the structure node that it belongs to.
- **Export Document(s)**: Copies of the given documents will be placed in a temporary folder, namely the export folder. Details can be found in the chapter Export Document(s)^[136].
- **ZIP**: Compresses the selected files.
- **Send To**: Opens the **Send To** menu, with which the given files can be, for example, sent to an e-mail recipient. Further information can be found in the chapter "Send To" Commands^[137].

For a quick search you enter a search term directly into the text box of the toolbar.

If you would like to search only a given branch of your structure, click on the structure node and then select the command **Find here** from the context menu.

4.8.2 Find in Text

Find in Text

Use this command found in the **Edit** menu to search comments for text passages or words. Alternatively, you can execute the command using the key combination **Ctrl + f** or by clicking on the button in the toolbar of the detail view.

In the dialog box you can enter your search text and choose



Find in Text



Ctrl + f

between three options:

- **Match whole word** searches for character strings that correspond exactly to your search text.
- Choose the option **Match Case** in order to make your search case-sensitive.
- If you do not select either of the options from above, you will receive partial matches to your search term. For example: You enter "structure" as a search term; as a search result you could find "structured", "Structure example", etc.

Here you can also choose the direction of your search: **Up** or **Down**.

4.8.3 Show Shared Content Locations

This function allows you to show a list of all existing shared content locations of a file or a structure node. To do so, double click on the **Shared Content Locations** icon of the given element which is displayed at the beginning of the row in the list view. This will activate the **Shared Content Locations** tab. Alternatively, you can select the given element and then click on the **Shared Content Locations** tab in the **List | View** menu. This guarantees that the tab is displayed permanently, i.e. also when opening a new project.



Shared Content Locations

In the row with the blue background you will find the document as well as the number of shared content locations in parenthesis. Under that the structure nodes will be shown to which the shared content locations are attached. By clicking on the minus sign in front of the file icon, you can hide the list. Clicking on an element of the list will color the corresponding structure node in the structure view to the left. This list is similar to the Document¹⁰³ list in its form.

By clicking on **Locate**¹⁵⁷, the corresponding file will be selected in the reference list and the structure node it is attached to will be shown.

Using the command **Remove all** in the toolbar you can delete the entire group of shared content locations.

A dialog box will open, indicating which shared content locations will be affected and requests that you confirm the deletion.

4.8.4 Manage Document

To receive an overview of the structure nodes to which a document is attached, you can create a list of these by using the **Manage Document** command from the **List** menu. The command is always applied to the currently selected document regardless of which tab is currently active.



Manage Document



Ctrl + Shift + F6

Alternatively, you can show the tab **Document References** using the menu **List | View** or you can press the key combination **Ctrl + Shift + F6**. This will show all of the attachments made to the document that is currently selected in the first tab.

Under the tab **Project Folder** you will find the **References**

command in the context menu, which likewise executes the **Manage Document** command.

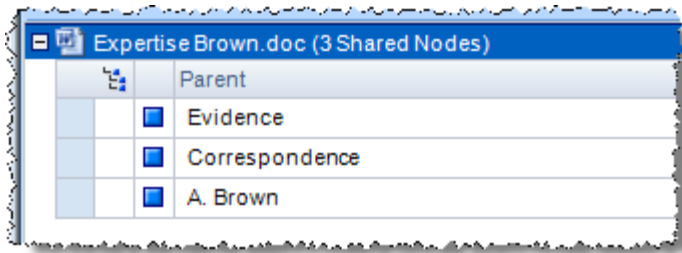


Fig.: Contents of the active tab "Document References"

In the row with the document icon you will find the document and be informed whether or not it is shared content. Under this the structure nodes to which the document is attached are shown. By clicking on the minus sign in front of the file icon you can collapse the list. Clicking on a structure node in the list colors the corresponding node in the structure view.

The following commands are available in the toolbar:

- **Locate**^[157]: The corresponding file will be shown as attached to its structure node.
- **Delete File and all References**: After clicking on this button you will be requested to confirm the deletion.

This function not only deletes all references to the document but also all subnodes and subordinated rows of the corresponding references. This is particularly relevant when a document has been attached to several structure nodes in a structure.



- **Windows Explorer**: With this command the folder in which the file is stored will be opened in Windows Explorer. You can find more information on this topic in the section Show Files in Windows Explorer^[135].

4.9 Using Two Monitors

You can use Normfall Manager with two monitors on one PC. This allows you to use one monitor for displaying Normfall manager with an open project file and another for displaying documents that you would like to attach.

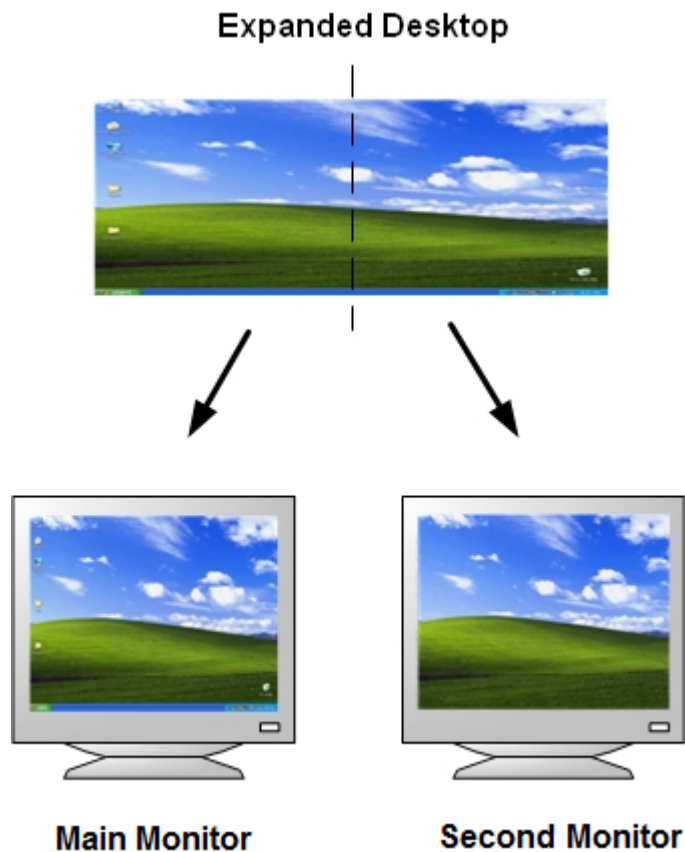
When using two monitors you have several modes of use available to you. You can display the same picture on both monitors or you can expand the Windows desktop over the second monitor.

When working with Normfall Manager this second option is interesting. This means that you have a wider area to work with, which is stretched over two monitors - which are ideally placed next to one another. If you leave the edge of the first monitor with the mouse pointer moving in the direction of the second monitor, your movement will be continued on the second monitor.

The Windows taskbar (the bar on the bottom edge of the screen) will appear on the first, or main, monitor; the second monitor will

appear "empty", that is, only a background picture will be displayed.

Generally the second monitor is to the right of the main monitor. From the view of the main monitor, the desktop will then be expanded to the right.



To be able to use two monitors with one PC you have to have a graphics card with two monitor outputs. A system administrator or hardware dealer can help you to find an appropriate model for your PC if your computer does not already support this option.

How you configure your graphics card for use with an expanded desktop depends mainly on the driver of your graphics card. The necessary settings can be found in the user manual of your graphics card.

When using Normfall Manager with two monitors it is recommended to open Normfall Manager on the second monitor. To do so, start Normfall Manager, click on the title bar of Normfall Manager and pull the window with a pressed mouse button to the desktop of the second monitor.

To always start Normfall Manager on the second monitor, pull the Normfall window to the second monitor and change the size of the window so that it is ideal for you. Then close Normfall Manager and open the program again.

If Normfall Manager is on the second monitor you can use the main monitor to view documents that can be attached directly to

the structure in Normfall Manager without changing windows with the Windows taskbar.

4.10 Working Together on a Network

Normfall Manager is fully network-compatible and is therefore also suitable for work in large offices and firms where several users may need access to the same file at the same time. Project files can be stored on a server and made available to several users simultaneously.

Clients with licenses for the Enterprise version (which is not free of charge) can work on a project simultaneously, clients with the free of charge Basic version and the Professional version (not free of charge) cannot. Project files can be opened on a network in the Basic and Professional versions of the software but the access to the file is then **exclusive**, which prevents other users on the network from accessing the project file.

Generally you have the option of opening a project file with read or write access.

Write access (or working actively) means that you have opened the project file with the **Open Project File** command from the **File** menu. In this mode you have write rights with respect to a project file and you can make changes thereto.

Read access (or working passively) means that you have opened a project file with the **Open Read-only** command from the **File** menu. In this mode you cannot make any changes to a project file.

Each user that has write access to a project file can edit the file. As soon as a user performs changes to a text editor, this field is blocked for all other users. Any attempt to enter text into this field will result in a prompt and the Record Locked Icon appears in the row. Blocking the current data record is automatically set back to the original setting after a given period of time which allows all users to edit the data record.

The following symbols can appear while working on a network with other users:

 : Marks the currently selected data record

 : Shows the editing of the current data record

 : Shows the blocking of the current data record, because it is being edited by another user

 : Shows the content update of the current data record (after being edited by another user)

Structure nodes and references that are deleted by other users are no longer editable and will automatically be updated when the file is next opened or can be manually updated using the function key **F5**. Generally the structure can be updated according to any changes made by other users working with the file by pressing the **F5** key or using the command **Reload Structure View** from the **File** menu.

A list of all users that are currently working on a project file can be viewed in the Enterprise version using the command **User List**  found in the **Tools** menu.

4.11 Backup Copies

By default, Normfall manager creates a backup copy of a project file that is closed by the user (this does not apply to projects on a database server). This option can be activated or deactivated individually for each project or all new projects.

If you do not set your own folder for storage, the backup copy will be placed in the TEMP folder of your user profile. You cannot directly see this folder in Windows Explorer. You can however call it up by entering the character string %TMP% into the address line of Windows Explorer.

As an alternative to this default folder you can choose any other folder to use as the backup folder. Furthermore, you can also disable the backup file function altogether. More on this can be found in the chapter Commands in the menu Tools| Options | Folders . If a project file is damaged and no longer capable of being opened, you will automatically be given the option of opening the backup copy (given that one exists).

If you would like to open a backup copy and the original project file is no longer available, you must open the backup copy manually.

To do so, start Normfall Manager and select the command **Open Backup Copy** from the **File** menu. A dialog box will open in which you can choose the backup copy that you would like to open.

4.12 Database Server

For professional use in a multiple user environment, the higher product variations of Normfall Manager (Enterprise) enable connecting to a database server.

While project files can be a good solution in small teams, a database server provides the best performance and stability when dealing with many users with simultaneous write access.

As of the creation of this user manual or respectively the help function, the only server system (DBMS) supported is Microsoft SQL Server 2005 and 2008. For further information on other supported systems please refer to our website or consult our support.

Microsoft SQL Server 2005 is available as a free Express edition, which can be installed on servers and normal computers and can be a sufficient database server for teams and smaller companies.

Before you choose to save your projects on a database server, please note the following drawbacks:

- The administration of projects on a database server is less flexible than in a file system. There is no folder structure available, only categorization.
- Transporting project data, e.g. with a data medium, is much

more difficult because at each system boundary an import or respectively export into (out of) the file system has to take place.

- Project data and attached documents are no longer stored in the same place. While you can usually move a project folder with a project file as desired on your system, with a database server moving the project folder with attached files requires you to specify the new location of the project folder.
- The automatic backup system of Normfall Manager is no longer effective on a database server. You have to execute regular backups of the server manually.

Except in particular scenarios where project data needs to be moved between systems frequently, companies with a professional IT infrastructure will not only be able to handle but will also require the use of a database server, because the advantages concerning performance and stability exceed the disadvantages concerning maintenance and application as soon as a certain number of users is working simultaneously on a project.

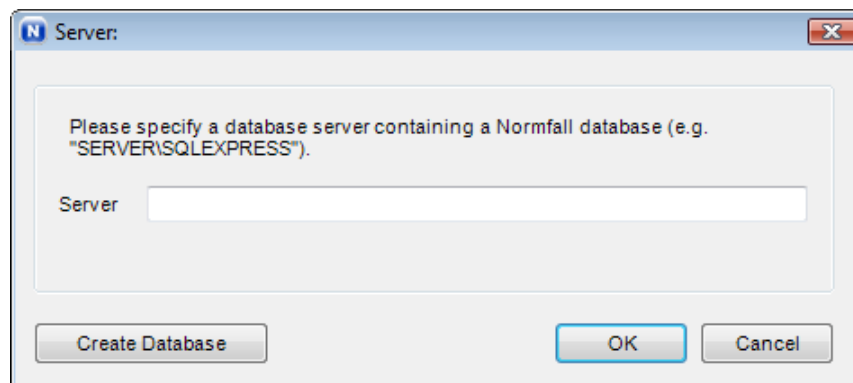
Many characteristic scenarios for the use of Normfall Manager do not depend on a higher number of users working simultaneously on a structure. For these cases the software still offers a solution using project files and self-contained project folders, which can hardly be surpassed due to its simplicity and lack of necessary maintenance.

4.12.1 Administration of a Database Server

Creating a Database

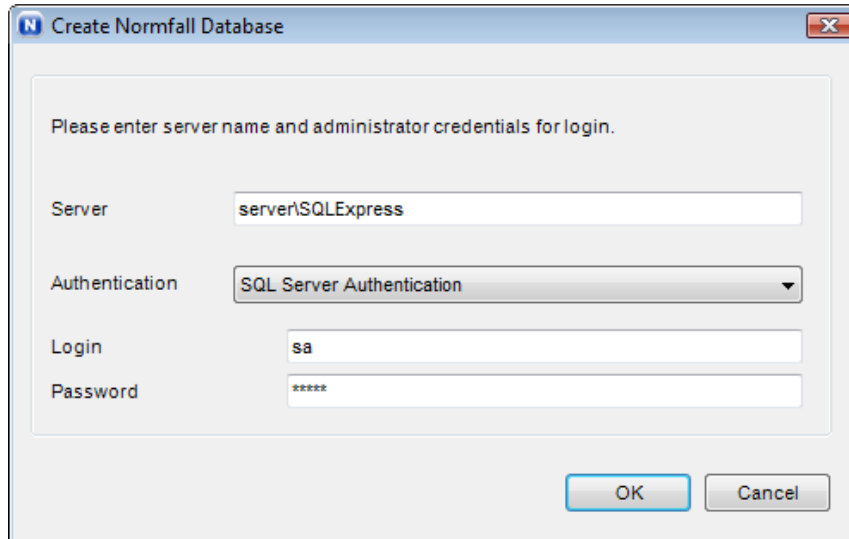
In order to create a Normfall database on a Microsoft SQL Server, proceed as follows:

1. Click on the command **Manage database Server** in the **Tools** menu. Alternatively, you can execute this command using the menu **File | Connect to Server**.
2. If a standard server has not yet been defined, or if the standard server is currently unavailable, a dialog box will appear in which you can enter the server to which you would like to connect, for example ".\SQLEXPRESS"; afterwards, click on **Create Database**.



3. Enter your access information for the administrator account in the next dialog box. Since the SQL Server is installed by default with an administrator account called "sa", this should be entered in the **Login** field.

Under **Tools | Options | database server** you can store these settings.



*If **SQL Server Authentication** is selected as the authentication mode, you are required to enter an administrator login, which is typically "sa" + password.*

*With **Windows Authentication** the account of the current user will always be used for login. In this case, it is not necessary to enter a password.*



4. Click on **OK** to create the Normfall database.

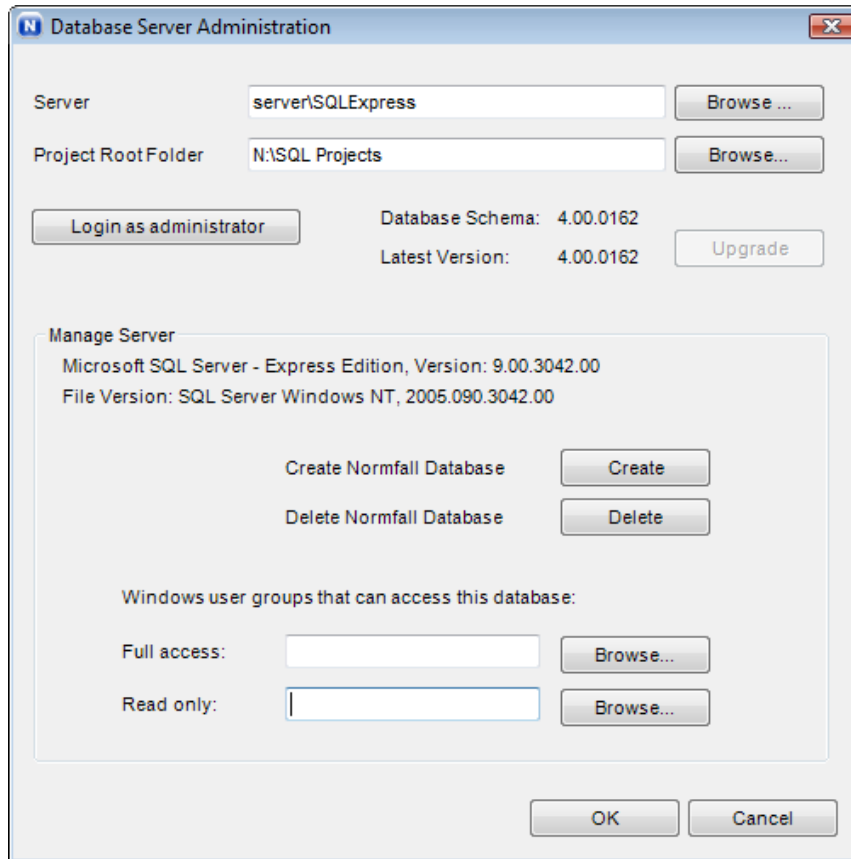
If the database was created, its initialization will automatically be carried out.

*Initialization note: It is also possible to **manually** create a database on the server and to allow Normfall Manager 4.0 to carry out the initialization. The process to do so is exactly the same as the process used to create a database.*



Defining the Project Root Folder

After successfully creating a database you can define the project root folder by clicking on **Browse**.



This folder is a **default** root folder for all project folders, i.e. when creating a new project the new project folder will be defined as a subfolder of the project root folder as default (the subfolder carries the name of the project). However, when creating a project, the user can opt to change this folder.

Entering a project root folder is strongly recommended in order to maintain a uniform filing structure of the project folders on the file system.



Deleting a Database

To delete a database you must be logged in as an administrator. To do so the database cannot be in use by any user.

In particularly, you may not have any project open on the server when deleting a database. Open projects will not automatically be closed.



Updating a Database

For future program versions of Normfall Manager, it may be necessary to update the database scheme. The currently used scheme as well as the newest version are shown herein. In order to update the newest version, click on **Upgrade**.

Setting read and write access

As administrator, it is possible to give Windows user groups either global access or restricted Read-Only access to the database. Using the button **Browse** you can define a group which you want to have the corresponding access and using the button **Reset** you can revoke this authorization if necessary.

Normfall Manager does not allow to set administrator rights. Only the system administrators of the server (the Sysadmin role - by default all members of the local Windows administrator group of the computer on which the server is running as well as the sa login) have these rights - and partially the user that has created the database.

However, it is possible to use administration tools for the SQL server (e.g. SQL Server Management Studio Express) to add further administrators to the database.

SQL Server FAQ

A) Which versions of Microsoft SQL Server are supported?

All versions of Microsoft SQL Server 2005 and 2008.

B) Are other database servers supported?

Not at the moment, but generally it is possible to offer support for other DBMSs (other than Microsoft SQL Server). If you have interest in support for a particular database server, please contact Normfall GmbH.

C) What happens when creating a database on the server?

A database with the name "Normfall" will be created and the Normfall data structures will be set up there.

D) Can I prevent the application from working with administrator privileges?

Generally, yes. Turn to the support at Normfall GmbH to receive more information on manually creating a database. You can create an additional user on the database or give a Windows user group write access to the database to make use of the function "Log-in as administrator" in the application for the given user or Windows user group.

The application does not save the login data, but rather temporarily holds the data in memory during the administration processes.

E) How do I connect to an SQL Server outside of my Windows domain by specifying an IP address?

You need to launch the application with the "/oledb:sqlncli" command line option, and SQL Server Client Components need to be installed on your computer. Enter your login credentials in the Normfall Manager Options in the Database section. Use "SQL Server Authentication" mode and enter the IP address for the

server name, or "IpAddress\NamedServerInstance" to connect to a named instance.

4.12.2 Working with a Database Server

On networks where more than 5 people access simultaneously Normfall Manager, the use of a database server is recommended in order to ensure stable performance of Normfall Manager. In this case the projects are saved and managed on a special database server, which all users in the network can access. Please refer to the section [Setting up a Database](#)¹⁰⁸ to find out what prerequisites this entails and how you or your system administrator create a database server.

In order to work with projects on a database server, click on **Connect to Server** in the **File** menu. The following dialog box will open:

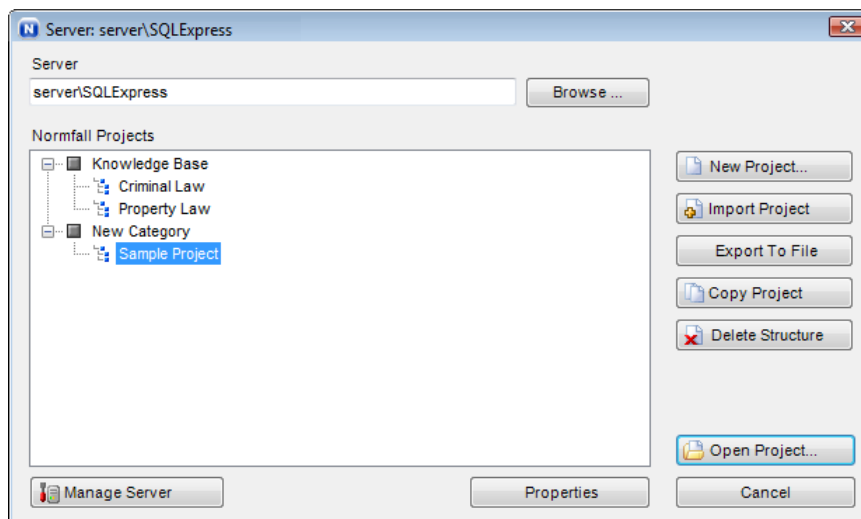
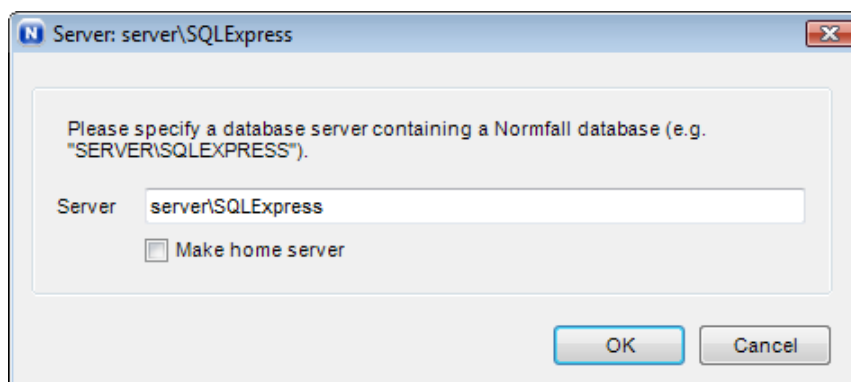


Fig.: Dialog box for working with a database server.

First, click on **Browse** to connect to the database server that you would like to access.



Under **Tools | Options | database server**¹⁴⁸ you can also define or delete the default server. In addition, you can save the password for the connection with the server.

If the free Express Edition of Microsoft SQL Server is used at

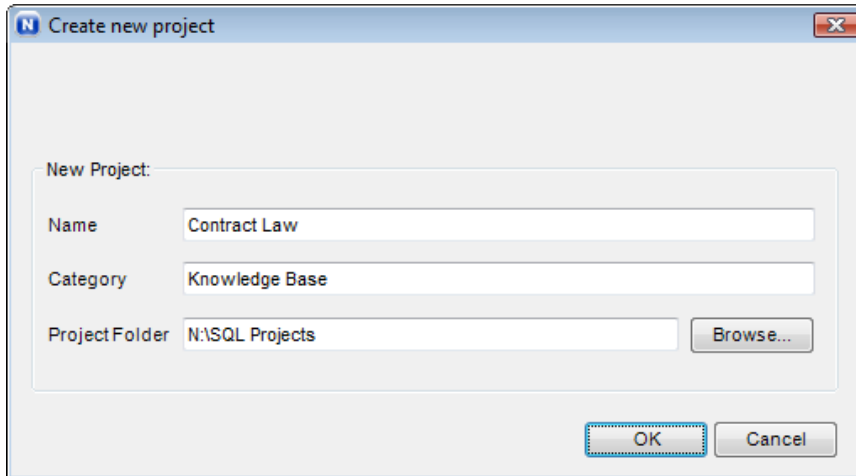
your company, the server name ".\SQLEXPRESS" is set by default. By clicking on the small box with the same name, you can set this server as your **Home Server**; when working with a database your home server will be accessed by default.

The white field marked with **Normfall Projects** shows the content of the database server, thus all projects available on the server.

Creating a new project



To create a new project on the database server, click on the button with the same name.



The dialog box titled "Create new project" contains three input fields: "Name" with the text "Contract Law", "Category" with the text "Knowledge Base", and "Project Folder" with the text "N:\SQL Projects". To the right of the "Project Folder" field is a "Browse..." button. At the bottom right of the dialog are "OK" and "Cancel" buttons. The "OK" button is highlighted with a dashed border.

In the window that opens subsequently please enter the name of the project next to **Name**.

You can assign the new project to a **Category**. If you, for example, would like to develop a knowledge management system out of several projects on a topic, name the category "Knowledge Base" and assign all projects on this topic to this category. If no category is set, the project will be created on the first level.

As a **Project Folder** you can either accept the default setting or choose another folder by clicking on **Browse**.

*The project folder can be set to any location on the file system and is **not** found on the databaseserver!*



Importing a project file



To import an existing project file from the file system to the database server, click on **Import Project**. A dialog box will open in which you can define the project file to be imported by clicking on **Browse**. Set the **Name**, **Category** (optional) as described above and confirm your entry by clicking on **OK**. The folder in which the project file to be imported is found is set as the default project folder.

Exporting in file

By means of this command, a database project is saved as Normfall project file^[35]. The project file is always created in the existing project folder which will open subsequently.

Copying projects



In order to copy a database project, click on the corresponding button. A dialog box will open in which the currently selected project on the SQL server is set as default source. In order to copy another database project, click on **Browse**. The default **Name** of the project is "New Project"; the default category is already set as **Category** which you can still change. Confirm by clicking on **OK**. Similarly, a new project folder is created.

Opening/deleting projects



First select the corresponding projects in the field **Normfall Projects** and then open or respectively delete them by clicking on the corresponding buttons.



Project properties

By clicking on **Properties** you open a dialog box that contains further information about the given project. These properties can be altered by clicking on **Edit**.

Using the menu **File | Properties** the dialog box can also be opened. Detailed information can be found in the chapter Project Properties^[126].

By clicking on **Edit** you can change individual properties. In this way you can, for example, select another project folder or change category assignment. Confirm your changes by clicking on **OK**.

Managing the server



To make changes to the database settings, click on the corresponding button.

In order to use this function, you will have to verify your status as system administrator.



4.13 The Relation Module

The Relation Module supports lawyers and judges when using the "Relationstechnik" ("relationship technique"), a German legal technique of applying law to facts.

The module allows the user to compare and comment texts in a simple manner. The following Overview^[115] provides a summary of the most important characteristics.

The functions described here are only displayed within the user interface if they are activated via a special license.

4.13.1 Overview

Support of individual working methods

You can work with original file excerpts as well as with your own comments and annotations; you may even combine both methods.

Perfect ergonomics

In Normfall PDF Editor you highlight the text to be attached by dragging it with the mouse. In the structure view, you select the node to which the text should be attached. Then you click on the **Attach** button. The software has pasted the text and displays a juxtaposition of all texts at the given structure node.

Easy to use

In a manner of speaking, the handling is self-explanatory. Each element of the software that supports the comparison of contents indicates this by differently colored buttons which serve to select the track you would like to work with at the moment.

Full text search

All attached text passages are directly ready for full text search. Add-ons like the Microsoft Indexing Service are not required.

Reference to the document

At any time it is possible to display the original text passage of a juxtaposed file excerpt.

Output as juxtapositions similar to file excerpts

File excerpts and/or own annotations can be output in table form at any time for a single topic, a partial structure or the whole file ("juxtaposition similar to file excerpts").

Classic view in Normfall Manager

The Relation Module is smoothly integrated into the classic Normfall Manager. All elements of the relation view can also be found in the classic view of Normfall Manager and are editable as usual.

Requirements from practice

The requirements to the Relation Module resulted from the strategic partnership between Normfall GmbH and the justice of the Land Hessen in order to optimize the existing software for its use in civil proceedings. Also in criminal cases and other legal proceedings the users can benefit from the module.

Application areas

Any area where texts should be juxtaposed when structuring complex subjects.

4.13.2 Setting up the Relation Module

Settings for the current project and for new projects

The Relation Module requires a special license which you must activate first. Then you can either activate the Relation Module functions for each project separately or determine that these should be activated for every new project by setting the corresponding option.

For more information on how to set up the Relation Module functions for the current project, please refer to the section Relation Module^[127] in the chapter Project Properties^[126]; detailed information on settings for new projects can be found in the chapter Options^[141] under New Project^[152].

When activating the Relation Module functions for a project, this project must possibly be converted. However, after a callback this step is automatically executed and the project can furthermore be opened with previous versions of the software.



Settings for projects on a Database Server

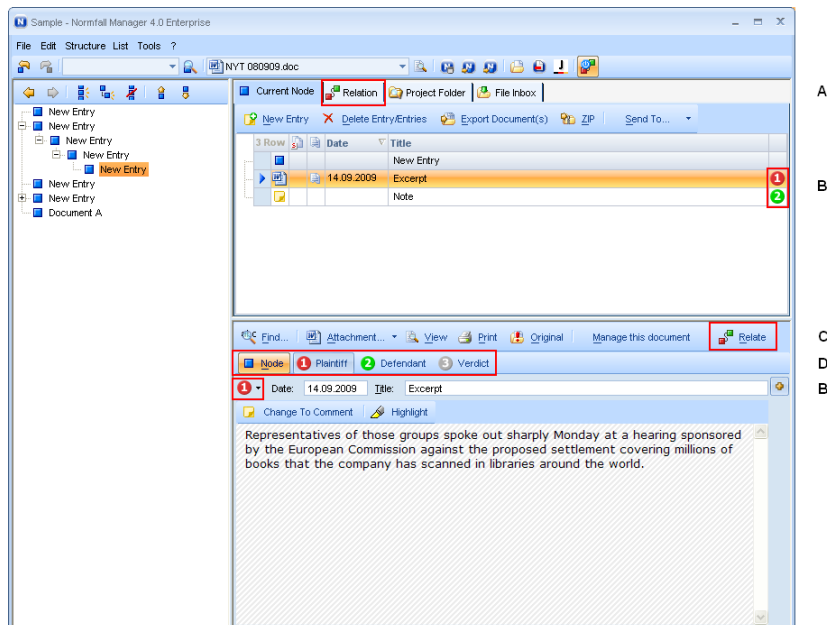
Projects on a database server must first be converted by the system administrator before they can be used with the Relation Module.

4.13.3 The Structure of the Application Window in the Relation Module

The following figure shows the application window of Normfall Manager with the activated Relation Module:

Tip: *The Relation Module can be (de-)activated in the Project Properties.*





Relation tab (A)

A new tab was added to the list view. By activating the relation tab the relation view will be displayed; here you can select the tracks whose contents should be juxtaposed (six tracks at most). For more details, please refer to the section The Relation Tab ¹¹⁷.

Track icon (B)

The track icon at the end of the row indicates which track each attachment or entry belongs to.

Relate button (C)

By clicking on this button the relation view will be displayed and its content will be refreshed. It is also possible to display this view by pressing the key combination **Ctrl + J**.

Track selection bar (D)

The track selection bar shows all available tracks. Unlike the relation view, here you can always select just one track for editing. The number and names of the tracks can be defined in the Project Properties ¹²⁶.

Track icon (B')

This track icon also shows which track the current reference/entry belongs to. However, by using this button you can change the assignment.

The Relation Tab

By clicking on the Relation Tab or **Relate** ¹¹⁷ Button found in the detail view, the contents of the tracks assigned to the selected structure node will be juxtaposed and displayed in tabular form. By pressing the key combination **Ctrl + J** the relation view will also be activated. In both cases the tab will only be shown while working on the current project.



To display the tab permanently (i.e. also when opening a project

next time), select the corresponding command from the **List | View** menu.



Fig.: Juxtaposition of the track contents

You can hide and display the available tracks by pressing the track buttons.

Each track entry shows a headline (bold) and a date, as well as a shortcut icon (document with arrow), an editing icon (structure node and pencil) and possibly a note icon. The note icon represents an entry row. By clicking on the shortcut icon, the attached document opens to the specific target to which the attachment refers or rather the original document opens to the respective page.

By means of the **Relate button**  in the tool bar of the detail view you can refresh the track contents.

How to hide and display tabs is explained here .

4.13.4 Inserting Documents and assigning them to Tracks

Documents can be attached to selected structure nodes in the usual way. If in the list view the **Relation** tab is active, the attached text is immediately displayed there. Select the track to which the content should be attached by means of the tool bar in the detail view.

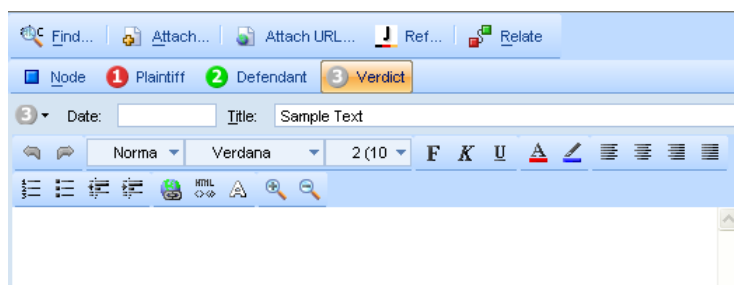


Fig.: Detail view with track selection bar

If you attach text from a Word document, the Normfall PDF Editor or an e-mail, the text (which, if necessary, at first must be selected by dragging it with the mouse) is automatically pasted

into the detail view or rather the relation view. In the example figure shown above, the text is attached to track 3.

Changing the track

If by mistake text was attached to the wrong track, the assignment can easily be changed by means of the track icon¹¹⁷ which is located next to the date field. By clicking on the small arrow symbol next to the track icon a drop-down list opens showing all available tracks. Change the assignment by simply selecting the right track number from the list.

Output to Word document

Please refer to the chapter Creating a Document out of a Normfall Structure⁸⁸ to learn how to output track contents to a Word document.

4.13.5 The Attach Box in the Relation Module

If the Relation Module is active, it is possible to attach selected text from a Word document or the Normfall PDF Editor via the attach box directly to a track. The text will then be displayed in the text editor where it is locked for editing; yet, it is possible to mark passages with the help of the **Highlight** button. Once attached, in the relation view the text will appear in italics which indicates an excerpt from an original file. In the detail view, an excerpt from an original file is displayed on a grey shaded area.

If you would like to enter your own comments, simply click on the **Change To Comment** button. The text editor will then be unlocked for editing such that it is possible to add text.

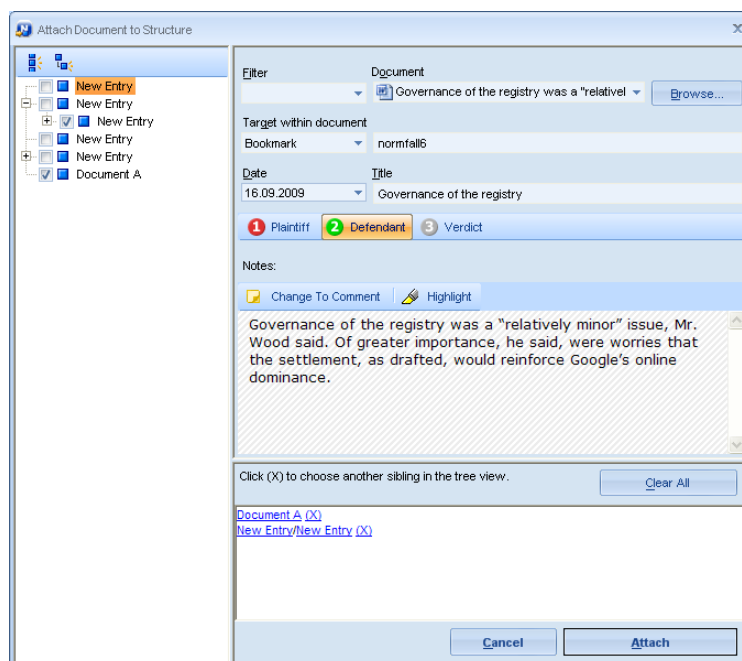


Fig.: The functions of the Attach Box in Relation Mode

4.13.6 Commenting Contents

There are three different levels on which comments can be entered, beginning with the structure node on the highest level, continuing with the single tracks until finally reaching the respective references/entries and free comments. Subsequently, these possibilities are explained.

Node Commentary

When clicking on a structure node with the Relation Module being activated, Normfall Manager does not necessarily show the node commentary first but the track commentary^[120] to the current track (i.e. the track which is currently selected in the track selection bar of the detail view).

So, in order to create a node commentary, select the **Node** button from the track selection bar and then enter your annotations in the text editor.

Track Commentary

The track commentary allows you to add your own summaries to each track assigned to a structure node.

The track commentary in the relation view

Click on the structure node to which you would like to write track comments and select the track to be commented in the detail view by means of the track selection bar.

As soon as you start to enter text in the text editor of the detail view, the color of the text editor will change from grey to white.

When you have finished commenting a track you can directly select the next one from the track selection bar. At the same time your annotation will be displayed above in the relation view (if the corresponding track is activated).

Finally, click on the **Relate** button to transfer the text to the relation view. The track commentary is always displayed at the top of the respective column in the relation view.

Note: The track commentary cannot be changed afterwards. This guarantees that there is always just one track commentary for each track.



The track commentary in the list view

Track commentaries can also be created in the list view. To do so, activate the **Current Node** tab in the list view and select the track to be commented in the detail view. As soon as you start writing in the (still grey colored) text editor, a new entry will be created in the list view showing the corresponding track icon at the end of the row and the text editor (which then appears white colored) will display the text you just entered.

Filter properties of the track commentaries

When selecting a track from the track selection bar in the detail view, the corresponding track comment will be displayed in the text editor. When navigating (clicking) through the structure view the track comment to the currently selected node will always be displayed.

If there does not exist any track comment to a track yet, the text editor will appear grey colored.

In the list view (**Current Node** tab) the structure node row will be displayed and the text editor appears in grey color until you start to create a comment there.

Deleting track commentaries

Track comments can be deleted like any other row/entry. Simply select the corresponding row with the track comment from the list view and delete it.

In the relation view you first have to click on the note icon which indicates the track comment in order to change to the list view where you can delete the comment as described above. Afterwards, return to the relation view.

Reference Commentary

To create a comment to a reference row, activate the **Current Node** tab and select the corresponding row/attachment to add your comments in the text editor of the detail view.

If there has been attached an original file excerpt, click on the **Change to Comment** button to unlock the text editor and add your annotations.

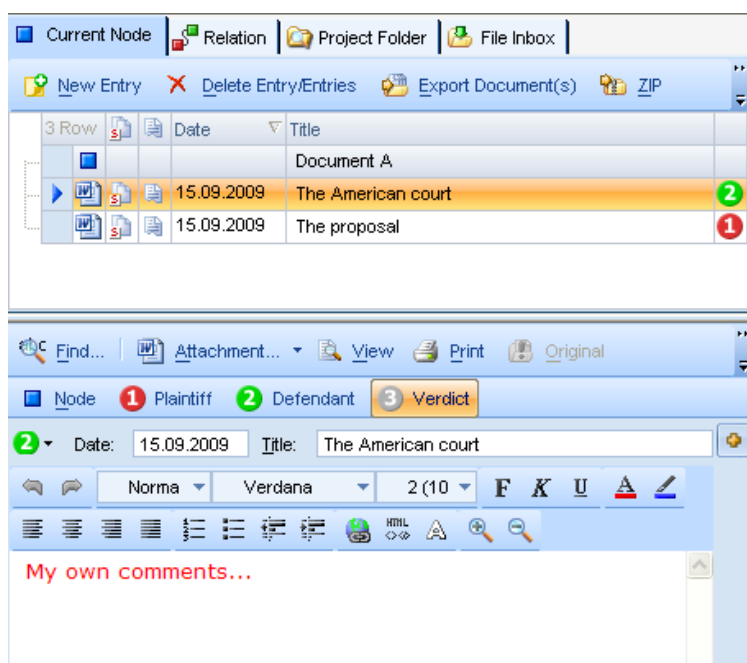


Fig. 1: Reference commentary in the text editor of the detail view

As soon as you change to the relation view, your comment will be displayed below the attached document in the corresponding track.

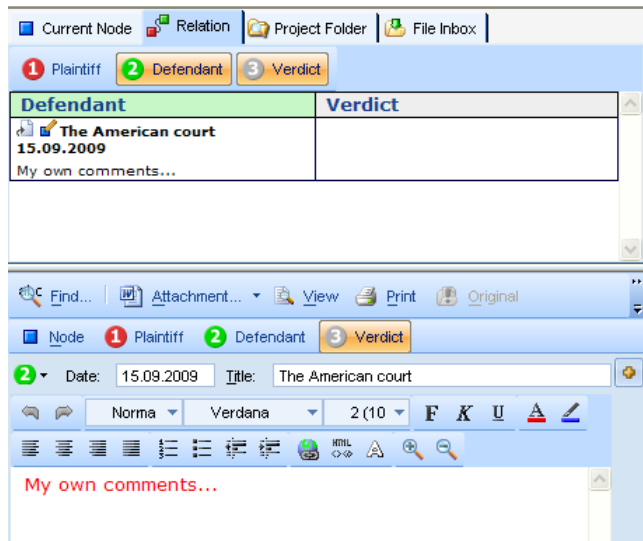


Fig. 2: Reference commentary in track 3

To edit your comment click on the pencil icon at the beginning of the text. You will then automatically change to the corresponding row in the list view so that you can enter your changes in the text editor.

Free Commentary

Free comments are not directly related to a structure node, a track or a reference, but they can be created on structure nodes in any number. Use the **New Annotation** button in the list view to add a new row and name it with a title. Then you can add your comment in the text editor of the detail view.

5

Reference

5 Reference

5.1 Command Overview

5.1.1 Functions in the File Menu

New Project

This command allows you to create a new Normfall project file in your file system and a new Normfall Project on the database server. For further information concerning the detailed procedure, please refer to chapter Creating New Projects.  49

 New Project

 Ctrl + n

New from Word

With this command you can create a project out of an outlined and structured Word document. The individual headings will be converted into structure nodes and the text belonging to the heading will appear in the text editor. For more on this topic read the chapter Creating a Normfall Structure from a Word Document  81.

 New from Word

New from Folder Structure

This command allows you to create a new Normfall Project on the basis of an existing folder structure in your file system, converting folders and sub folders into structure nodes and sub nodes. Files saved in these folders will be converted into attachments in the reference list. For more detailed information refer to this  50 section.

 New from Folder Structure

Open Project

To open an existing Normfall Project, click on the command **Open Project**.

 Open Project

Alternatively, you can use the key combination **Ctrl + o** or, provided that it is available, you can click on **Open Project** in the toolbar.

 Ctrl + o

If a project file is already loaded and another project is opened, Normfall Manager automatically closes the project that is currently loaded. To simultaneously work on several structures, you can get around this by pressing and holding the **Shift** key while opening the project. Under certain circumstances it is necessary to release the mouse button only a short moment after clicking on the control element thus opening the project. The newly loaded project will then open in a new window.

Open Read-only

To open a project file in read-only mode, select the command **Open Read-only**. In this mode you cannot make any modifications to a project file. Read access only allows you to passively work on a project file. This command is available depending on the product version.



Connect to Server

Normfall Manager supports Microsoft SQL Server so that projects can also be created and managed on database servers. To work with a database server, click on **Connect to Server**. More detailed information can be found in the chapter Working with a database Server^[112].



Reload Structure View

If you make changes to individual structure nodes or rows that in turn have an effect on other nodes (for example when working with shared content locations^[97] or shortcuts^[97]), you can update the view of your structure using the command **Reload Structure View** or alternatively by pressing the function key **F5**. This function is also useful when several users on a network are simultaneously working on a project and making changes.



Open Backup Copy

With a project loaded you can open the backup copy of the current project file with the command **Open Backup Copy**. Further information can be found in the chapter Backup Copy^[107].

If no project file is loaded, this command allows you to open the folder in which the backup copies are saved by default. It is possible to make settings concerning this folder in the menu **Tools | Options | Folders**.

Save as

The command **Save as** is only shown when a Normfall project file is open. This command allows you to save the current project file to any location with any desired name.

Please note that every change made to a project file is automatically saved immediately. Manually saving changes to a structure is neither necessary nor possible. Accidental deletion of structure nodes or reference rows from your structure is prevented by a security warning which occurs before each deletion.



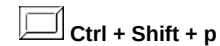
Close

To finish your work on the current project and close it, select the command **Close**. Normfall Manager automatically saves any made changes and still remains open after closing a project. When closing, a backup copy of the project is created. You can

deactivate this function in the **Tools | Options | Project | Current Project** menu, by clicking on and removing the check in front of **Create backup copy when closing**.

Print Current Text

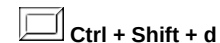
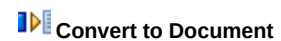
You can print the text of the current comment editor using the command **Print current text**. Alternatively, you can invoke the context menu in the comment editor and execute there this command, press the key combination **Ctrl + Shift + p** or click on the corresponding button in the toolbar of the detail view.



You can adjust your print settings (for example, setting landscape orientation) in Internet Explorer using the menu command **Page Setup**. Such adaptations are permanently valid for both the Internet Explorer and the text editor.

Convert to Document

This function allows you to convert the whole structure or parts of it into a Word document or HTML file. For detailed information on this function please refer to the chapter Converting Structured Text Documents⁸¹.



Properties

Clicking on **Properties** opens a dialog box with the following information on the corresponding project. Below you see the properties dialog for a project which is stored in the file system:

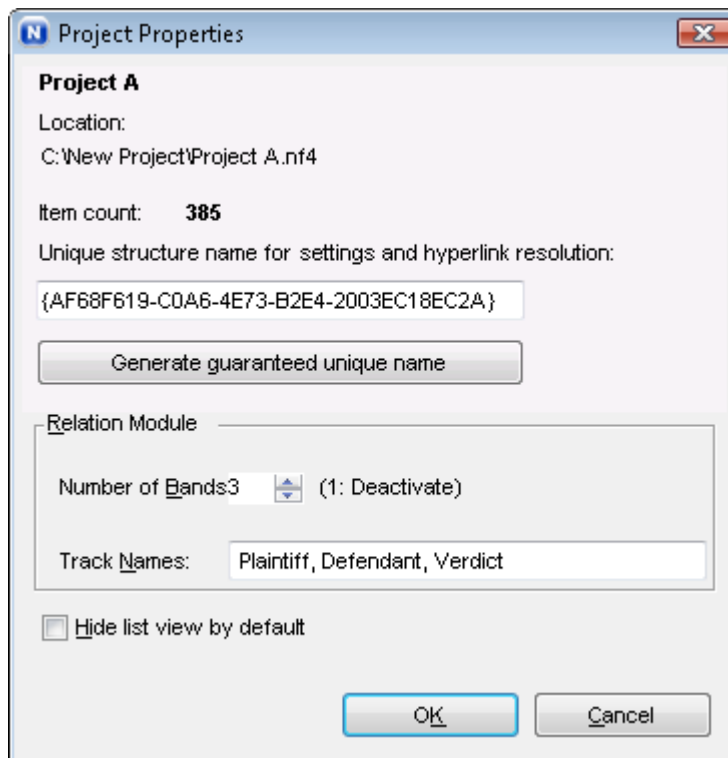


Fig.: Properties dialog box for a project in the file system

Location:

Shows where the project file is saved.

Item Count:

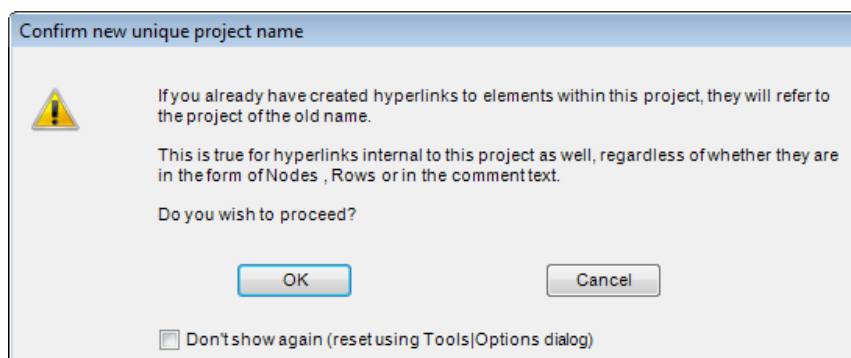
Shows how many structure nodes the project contains.

Unique structure name for settings and hyperlink resolution:

Here you can find the project identification number, which is automatically created by Normfall Manager and necessary for the use of hyperlinks. Further information on hyperlinks can be found in the section Hyperlink⁹⁸.

You can replace this number with a chosen name by entering the name in the text box and clicking on **OK**.

Since hyperlinks that already exist will be rendered invalid by altering the unique project name, a dialog box appears with a corresponding warning:



Confirm the change of the name by clicking **OK** or if necessary, cancel the action.

Using the **Generate guaranteed unique name** you can likewise change an existing project ID.

Hide the list view by default

This command allows you to hide the list view by default. Using the **Tools | Options** menu you can change the setting at any time. See the chapter Showing and Hiding the List View³⁴.

Relation Module

In this section it is possible to define the number of tracks you would like to use when working with the relation module. If, for example, you want to use three tracks, named "Plaintiff", "Defendant" and "Verdict", simply increment the **Number of tracks** to "3" and insert the track names separated by commas. More information can be found in the chapter Relation Module¹¹⁴.

For projects on a database server¹⁰⁷, the following additional properties will be shown:

Name:

The project name is shown here.

Category:

Provided that the project is assigned to a category, this will be shown herein. The category assignment can be changed here.

Project Folder:

Shows the location of the project folder, in which all documents belonging to the project are saved.

*If the properties dialog box was invoked for a project on a database server, you first have to click on **Edit** to change information.*



Project Properties

Normfall

Location:
Server: server\SQLEXPRESS:Normfall

Item count: **9405**

Unique structure name for settings and hyperlink resolution:
{BF4A0149-20C0-4C03-9E98-5CAC9ECDD86B}

Generate guaranteed unique name

Name: Normfall

Category:

Project Folder:
N:\Projekte\WfSqlServer\Normfall

Browse...

☐ Hide list view by default

OK Cancel

Fig.: Properties dialog box for a project on a database server

Opening Recent Projects

On the end of the menu the last five Normfall Projects that you have worked on will be shown.

You can open a project by clicking on it; any project that was already loaded when selecting the project will be closed (and any changes made to the project will automatically be saved).

To work on several projects simultaneously, you can press and hold the **Shift** key while clicking to open the project. Under certain circumstances it is necessary to release the control element a short moment after clicking to open the project. The newly loaded structure will then open in a new window.

The Recent Projects List is being synchronized in all program windows of Normfall Manager 4.0 when working on several projects simultaneously.

Exit

Click on the **Exit** command in order to finish your work with Normfall Manager. Any changes made to your project will automatically be saved.

5.1.2 Functions in the Edit Menu

History Back

When navigating through your structure or the reference list, Normfall Manager keeps track of the order in which you select nodes and rows. Click on the command **History Back** to page through your history one move backwards.

Alternatively, you can click on the corresponding button in the toolbar or use key combinations.



History Forward

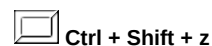
When navigating through your structure or the reference list, Normfall Manager keeps track of the order in which you select nodes and rows. Click on the command **History Forward** to page through your history one move forwards.

Alternatively, you can click on the corresponding button in the toolbar or use key combinations.



Undo

Click on **Undo** to cancel the last change made to the structure (e.g. the creation or deletion of a new structure node or row). Alternatively, you can click on the icons in the toolbar or use a key combination with the keys **Ctrl**, **Shift** and **z**.



Redo

Click on **Redo** to execute a command once again which resulted in a change to the structure or the reference list. Alternatively, you can click on the icons in the toolbar or use a key combination with the keys **Ctrl**, **Shift** and **y**.



Undo (Text)

This command allows you to undo changes made to a structure node or a row. Alternatively, it is possible to execute these commands by means of a key combination.

Thus, it is easily possible to undo text changes in the text editor. Furthermore, you can also use the icons in the toolbar of the detail view for editing text.



Redo (Text)

This command allows you to redo changes made to a structure node or a row. Alternatively, it is possible to execute these commands by means of a key combination. Text changes in the text editor can be redone in this manner. Furthermore, you can also use the icons in the toolbar of the detail view for editing text.

 Redo (Text)

 Ctrl + y

Cut

This command allows you to cut the selected structure nodes, reference rows or text passages.

 Cut

- Select the corresponding elements/text passages.
- Select the command **Cut** from the **Edit** menu.

 Ctrl + x

The cut elements can be found in the clipboard^[176] of your operating system and can be inserted again to any location by invoking the **Paste** command. You can also insert structure nodes to another Normfall structure that is open simultaneously.

The command is also available in the context menu^[167] or via the key combination **Ctrl + x**.

Copy

This command allows you to copy the selected structure nodes, reference rows or text passages.

 Copy

- Select the corresponding elements/text passage.
- Select the command **Copy** from the **Edit** menu.

 Ctrl + c

The copied objects can be found in the clipboard^[176] of your operating system and can be inserted again to any location by invoking the **Paste** command. You can also insert structure nodes to another Normfall structure that is open simultaneously.

The command is also available in the context menu^[167] or via the key combination **Ctrl + c**.

Paste

With this command it is possible to paste different contents from the clipboard at other locations within your project. Use this function to paste

 Paste

- text into the comment editor
- structure nodes to the same level^[94] and
- reference rows

within the detail view, structure view or list view respectively.

For further information please consult Paste Options^[92] or Paste Options of the Text Editor.^[89]

Select All

In the structure view, this command allows you to simultaneously select all structure nodes of the same level. To do so, click on a structure node and execute the command **Select all**.



In the list view, this command causes that all elements of the list will be selected .

Alternatively, you can also use the key combination **Ctrl + a**.

Rename

To rename a structure node or a reference row, proceed in the following manner:



Select the element and execute the command **Rename**.

Selectively, you can also use the function key **F2** or click on the text area of an already selected element without moving the mouse. The command is also available in the context menu.

If you would like to copy text (for example, from a Word document) when renaming a structure node with, follow these instructions:

1. First, select and copy the text to the clipboard (using the key combination **Ctrl + c** is usually the easiest way to do so).
2. Select the given structure node and press the **F2** key.
3. Click on the text line with the right mouse button and select the **Insert** command from the context menu.

Shortcuts cannot be renamed. To rename a shortcut, simply rename the structure node that is the target of the shortcut and the shortcut itself will also receive the new name.

If a **shared content location** is renamed, any changes made to it will be visible as soon as the **File** command **Reload Structure View** is executed, which can also be done by pressing the function key **F5**.



Find in Text

Use this command to search for certain terms. Here  you will find further details.



5.1.3 Functions in the Structure Menu

Find in Project

With this command you can search the entire project and all attached documents for certain terms. See Searching and Finding^[101] for more detailed information.



Find in Project

Find in Selected Branch

If you would like to search only a given branch of your structure, click on the corresponding structure node and then select the command **Find in Selected Branch** which can also be found in the context menu.



Find in Selected Branch

Here you have all functions available that are described under Find in Project^[101].

*Note: In the context menu of the given structure node this command is called **Find here**.*



Up

You can move a selected structure node including all comments and subnodes one position upwards within one level.



Up

To do so, click on the desired structure node and select the command **Up**.



F7

You can also use the context menu for this, or alternatively, the function key **F7**.

Down

You can move a selected structure node including all comments and subnodes one position downwards within one level.



Down

To do so, click on the desired structure node and select the command **Down**.



F8

You can also use the context menu for this, or alternatively, the function key **F8**.

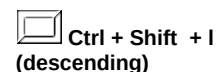
Sort

This command allows you to sort all structure nodes of the same level in ascending order. Alternatively you can execute this command via the context menu or by means of the key combination Ctrl + I.



Ctrl + I
(ascending)

You can also sort the nodes in reversed order by additionally pressing the **Shift** key.



Ctrl + Shift + I
(descending)

Change Type

You can define different node types by using this command. More details can be found in the chapter Node Types. 

Delete Branch(es)

There are several ways to delete structure nodes including all subnodes, references and comments belonging to them, after you have clicked on the nodes to be deleted:

- The **Delete Branch(es)** command.
- A click on the icon in the toolbar.
- The key combination **Shift + Del**.



Convert to Row

You can convert a structure node to a row by selecting the corresponding structure node and then choosing the command **Convert to Row**. Alternatively, you can invoke the command using the context menu.



However, this command is not available, when

- the given structure node is found on the first level of the structure or
- the structure node to be converted contains several sublevels of subnodes.

Alternatively, you can use the key combination **Ctrl + right**.

New Node

In order to insert a new structure node after the currently selected node on the same level, several options are possible:

- The command **New Node**.
- A click on the icon in the toolbar.
- The command with the same name found in the context menu.
- Pressing the function key **F9**.



New Subnode

You can insert a new structure node as a subnode of the selected node (that is, one level lower than the selected node) in the following ways:

- Using the command **New Subnode**
- Clicking on the icon in the toolbar.
- Selecting the command with the same name in the context menu.
- Pressing the key combination **Ctrl + F9**.



Insert from Microsoft Word

This function allows you to paste a structured Word document into the currently opened project. In the chapter Converting Structured Text Documents^[81] you will find more detailed information in the section Creating a Normfall Structure from a Word Document^[81].



5.1.4 Functions in the List Menu

View

In this sub menu there are functions which allow you to show or hide the list view^[34] and the tabs in the list view.^[30]

New Annotation

With the **New Annotation** command you can add a new row to the reference list without referring to a document.



Alternatively, you can press the right mouse button in the reference list and select the command **New Annotation** from the context menu or use the function key **F11**. This command is only available if the mouse pointer is located in the list view.



Delete Entry/Entries

You can delete several rows from the reference list simultaneously. To do so, click on the row that you would like to delete so that it is marked with blue. To select several rows at the same time, press and hold the **Ctrl** key while clicking on all rows that you would like to delete. Then execute the command **Delete Entry/Entries** from the **List** menu or context menu, which will open a dialog box, which will ask you to confirm the command. The rows and all comments belonging to them will be irrevocably deleted; the documents in your project folder will however remain untouched.



Alternatively, you can click on the button in the toolbar of the list view.

Convert to Node

To convert a row from the reference list into a structure node, click on the given row and execute the command **Convert to Node**, either from the context menu or the **List** menu. Normfall Manager will then add the row as a new subnode of the node in your structure that the row was attached to before the command was executed.



Alternatively, you can use the key combination **Ctrl + left**.

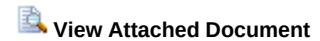
Show Shortcut Target

Click on a shortcut in the reference list and execute the command **Show Shortcut Target** in order to find out to which document under which structure node the shortcut refers. Alternatively, you can find this command in the context menu.



View Attached Document

Using the command **View Attached Document**, you can view or respectively open documents found in the reference list (the commands vary depending on which tab is currently active); click on the appropriate row and then execute the command. Alternatively, you can open the document by double clicking on the file icon found at the beginning of the row or by using the command found in the context menu.



By clicking on the appropriate button in the toolbar of the detail view you can also open the desired document.

Print File

To print an attached document directly, execute the **Print Document** command found in the **List** menu. You will also find this button in the toolbar of the detail view.



Show Original

In the detail view you will find the **Original** command by means of which you can display the originally attached file in Window Explorer. Attached e-mails will be shown in Outlook - provided that they are still available in the saved messages of Microsoft Outlook. Attached websites will be shown online in your browser. To do so, select the desired row in the list view and then click on the button in the toolbar.



Alternatively, you can execute this command using the context menu or with the function key **F4**.

The original file cannot be moved since this alters the source path and therefore makes the original no longer available to be shown.



Windows Explorer

The command **Windows Explorer** allows you to open exactly the folder in Windows Explorer that contains the concerned file. This file will automatically be marked there.



You will not only find this command under the **Current Node** tab but also under **Recent Docs (Project)** and **Recent Docs (System)**. In this way, individual documents located in folders with numerous files can also be found quickly.



Alternatively to the menu command, you can also use the function key **F6**.

Document References

To have an overview of the structure nodes to which a document is attached you can use this function which is also available via the key combination **Ctrl + Shift + F6**. Alternatively, you can show the Document References tab^[32]. For further information please refer to the section Manage Document^[103].

 **Document References**

 **Ctrl + Shift + F6**

Export Document(s)

To use attached files outside of Normfall Manager (for example, to make them available to others), simply export them by means of the export function. You can find this function in the list view as well as in the search view (this means with an active search tab, which can be invoked using **Ctrl + s** or by means of the **Find in Structure** command from the **Structure** menu).

 **Export Document(s)**

- Select the desired documents by clicking on the beginning of the reference row in the reference list. (For further information about how to simultaneously select several reference rows please refer to the chapter Selecting Several Reference Rows or Structure Nodes^[33].)
- Click on **Export Document(s)** in the toolbar of the list or search view.

Alternatively, you can execute the command found in the **List** menu or the context menu.

Normfall Manager saves copies of the documents in a temporary folder known as the export folder. This folder opens automatically after the export.

Normfall Manager creates the export folder and manages it in a temporary folder. Objects in this folder will automatically be deleted according to the settings of the software in regular intervals.



ZIP

The ZIP function allows you to compress large files or several documents as a ZIP file.

 **ZIP**

- Select the corresponding documents in the reference list.
- Click on **ZIP** in the toolbar of the list view.

Normfall Manager will create a ZIP file in a temporary export folder that will automatically be opened in Windows Explorer.

Normfall Manager creates the export folder and manages it in a temporary folder. Objects in this folder will automatically be deleted according to the settings of the software in regular intervals.



Send To

This submenu offers you all the functions that you are already familiar with from the "Send To" menu of the Windows Explorer context menu. Depending on the configuration of your computer you have the option here of, for example, sending a document directly as an e-mail attachment or creating a desktop shortcut.

- Select the corresponding documents in the reference list.
- Click on **Send To** in the toolbar of the list view.

Alternatively, you can invoke the corresponding command by means of the context menu:

- Select the corresponding documents in the reference list.
- Click on the grey area in the list view with the right mouse button.
- Select the desired option from the **Send To** menu.

Attach Box

This command opens the attach box which allows you to attach documents in a multidimensional way. See The Attach Box. ⁷⁵



View Juris Database

This command opens the Juris website with Internet Explorer. After your research Normfall Manager allows you to attach your search results to your project. For more detailed information on Attaching Juris Documents ⁷⁹ and Saving Juris Access Data ⁷⁹ please refer to the chapter Juris Documents ⁷⁹.



Attachment

Attach Document

With this command you can add a reference to a new (empty) row in the list view or to a new structure node in the list view. Details are given here ⁵⁹.



Attach Juris Doc

Create a reference to a researched Juris document ⁷⁹.



Attach URL

Create a link to a website. Further information can be found here ⁸¹.



Detach Document

With this command you can remove a reference from a structure node. Click on the corresponding document in the list view and select the command **Detach Document**. In the list view the file icon will be removed from the beginning of the row.



Launch Normfall PDF Editor

With this command you can launch the integrated Normfall PDF Editor. The Editor is a free additional module for Normfall Manager 4.0 and allows you to view and create references to specific pages within the PDF files in a comfortable manner without the files to be modified.

For more information on Normfall PDF Editor please refer to the corresponding manual which is available for download on our website: www.normfall.com.



Launch Normfall PDF Editor

5.1.5 Functions in the Tools Menu

Set/Change Password

You can prevent others from accessing your project files. Click on **Set/Change Password** in the **Tools** menu to open the following dialog box:

To create a **new password** enter it into the text box **New Password**, repeat it in the next box and confirm your entries by clicking on **OK**.

To **change** an **existing password** enter it into the text box **Old password** and then create the new password. Repeat the password and confirm by clicking on **OK**.

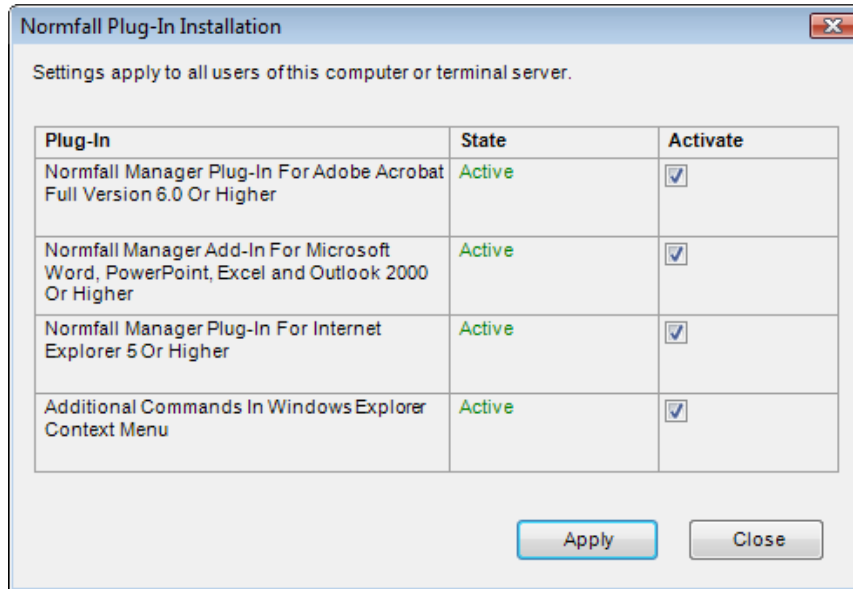
To **delete** an **existing password** without replacing it, enter it into **Old password** and leave the other fields empty. Confirm by clicking on **OK**.

Passwords only apply to project files but not to projects on a database server!



Plug-In Installer

Using this function you install plug-ins for the full version of the program Adobe Acrobat 7.0 and higher as well as for the applications of the Microsoft Office package. The plug-ins allow you to directly create references from the given programs. To learn more about this topic see the chapter Plug-Ins for Attaching Documents ⁶².



In the column **State** you can see whether or not a plug-in is installed or not at the moment.

In the column **Activate** you can see which plug-ins will be installed or deactivated by clicking on **Apply**. If a check is **visible**, the plug-in will be **installed**, given that this is not already the case. If the check is **not visible**, the plug-in will be **deinstalled**, given that it is already installed. To exit the installation click on **Close**.

*Since the settings are valid for all users of the computer or server, you need **Administrator rights**, to be able to change them. Otherwise the checks will appear with a grey background and cannot be changed.*



In most applications for which Normfall plug-ins exist, each individual user has the option of hiding the Normfall toolbar and consequently deactivating the plug-in itself, even if it has been installed by the administrator.

Settings for other Applications

Normfall Manager 4.0 allows you to paste hyperlinks ⁹⁸ to structure nodes as "bookmarks" in an editor which supports hyperlinks such as Microsoft Word or Adobe Acrobat. When clicking on such link to reach the desired structure node within a project, the respective application may display a warning message.

Warning messages which are shown when clicking on a hyperlink out of a Microsoft Office application can be suppressed by means of the command **Settings for other Applications**. Furthermore, when clicking on a hyperlink, Normfall Manager 4.0 will show a notice which points to the above mentioned command. You can configure the settings for this dialog in the Tools | Options | Prompts^[143] menu.

In Adobe Acrobat those warning messages can be deactivated with 'Edit | Settings | Trust Manager | Change Web Settings | Allow all web sites'.

Manage Database Server

Normfall Manager supports Microsoft SQL Server so that structures can also be created and managed on a database server. Detailed documentation on these functions can be found in the chapter Database Server^[107].



User List

With this command an overview of all users will be displayed that are working on a project file simultaneously. This command is particularly useful when jointly working on a project within a network. The table shows on which computer the user is logged in, which access type the user has (write access or read only) and whether the project file is exclusively open. However, users that do not have write access on the file system or database level are not recorded.



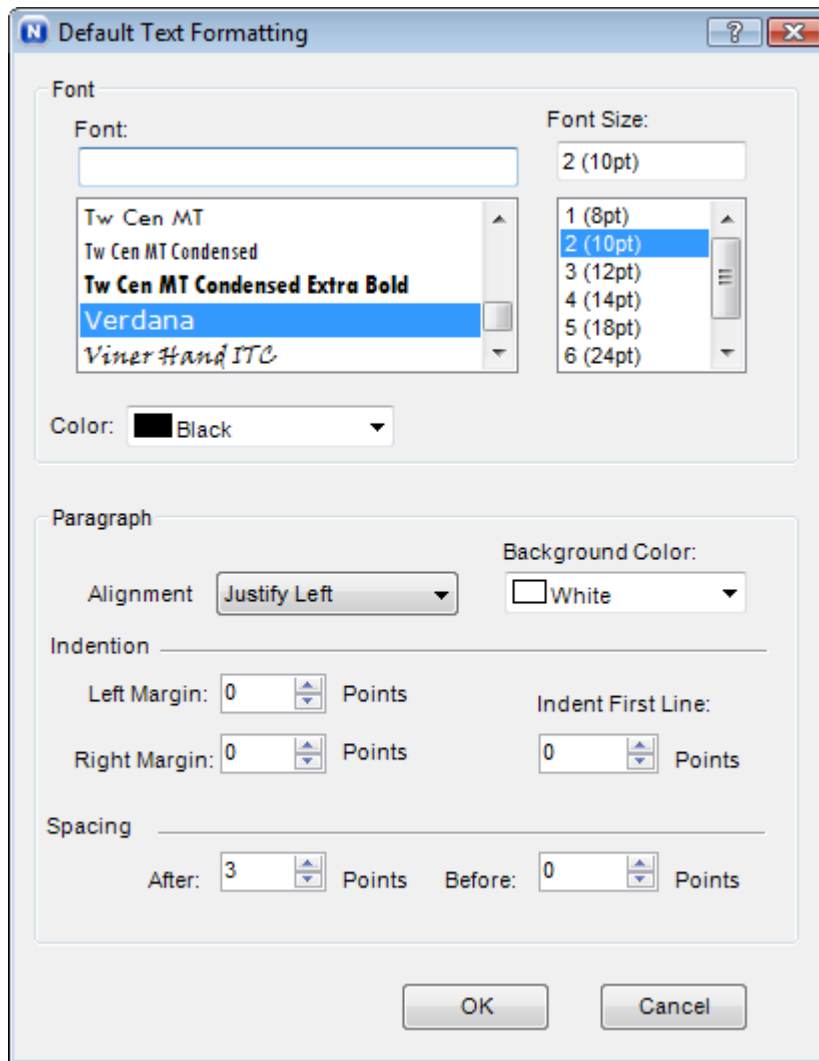
File Maintenance

File maintenance corrects errors in project files that can result from multiple user access. Additionally it defragments the project files so that they are smaller and memory is saved. We recommend this for extensive projects when you would like to archive or send them by e-mail. The information of your project is **not** lost during this process.



Editor Formatting Options

Herein, default text settings such as font type and size, alignment, line spacing etc. can be changed.



These settings will be applied globally for all texts of the detail view^[34]. To format individual passages differently use the commands of the toolbar found in the text editor^[88].

Options

In the options box you can individually change **general** as well as **project related settings**. The general settings are arranged into the following categories: Folders^[142], Language^[143], Prompts^[143], Juris^[146], Attach Settings^[147], Database Server^[148], Other^[149].

Project settings can be altered for the current project^[151] as well as new projects^[152].

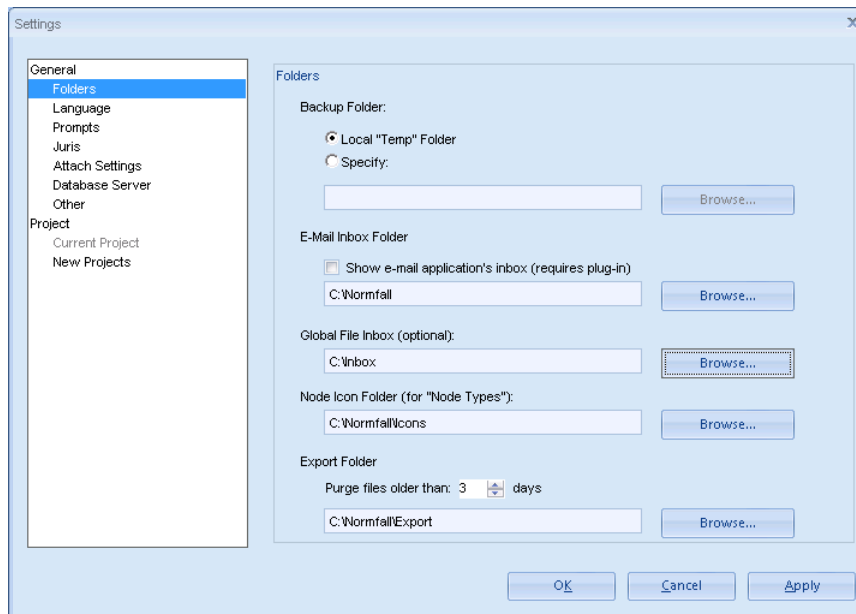
In the following chapters these functions will be explained in detail.

Also, system administrators can control settings for user groups by means of the Normfall Manager Administration Kit, which can be downloaded from our website www.normfall.com.

The Administration Kit allows administrators to define the options settings for a user group (on all computers of an organisation). For every single setting it is possible to define whether it should

have a one-time effect (i.e. they can be changed by the user) or a permanent effect (cannot be changed). Permanent settings can only be changed temporarily for the current project by the user; they will be reset when the project is closed or when the options dialog is opened by the user again.

Folders



Backup Folder

Windows has a so-called TEMP folder for each user on the computer. Here files will be buffered that can be deleted when cleaning up the hard drive. The folder can be viewed by typing %TMP% into the Address bar of Windows Explorer.

You can determine in which folder the backup copy of your structure should be saved. You can accept the pre-defined folder or, by clicking on **Browse** after selecting **Specify**, you can define an alternative location for storage.

Global File Inbox (optional)

You can either accept the pre-defined folder or, by clicking on **Browse**, you can define an alternative (global) location for this folder. This is particularly recommended when working on a network (see the chapter Inbox Folder^[54] in the section Folders^[52]). To do so, you must active the option **Use Global File Inbox** by placing a check in the box under **Project | Current Project**.

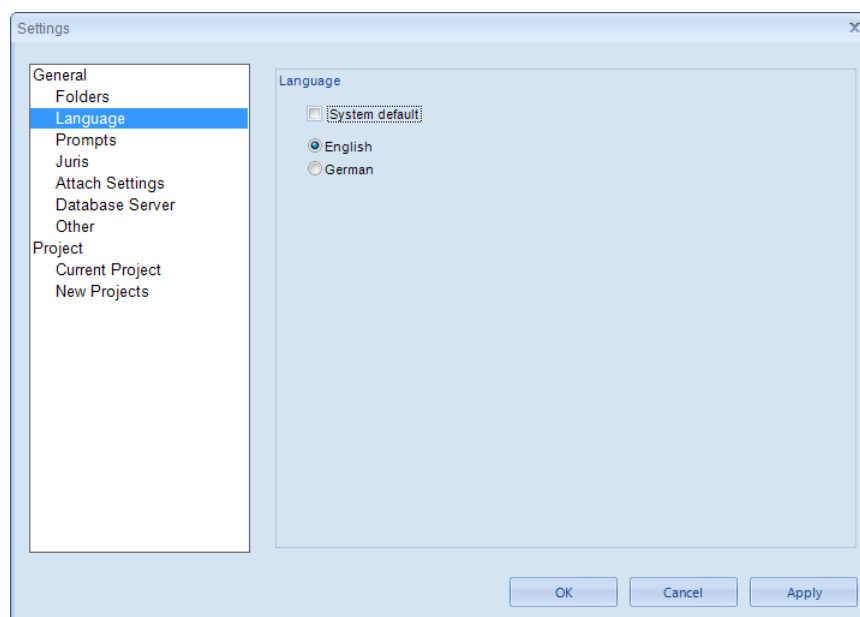
Node Icon Folder (for "Node Types")

Here you can select the folder which contains custom icons for structure node types. You may choose a folder that you share with other users. If you want your icons to be displayed in other users' structure view, they need to have the same icon files available. More details can be found in the chapter Node Types^[99].

Export Folder

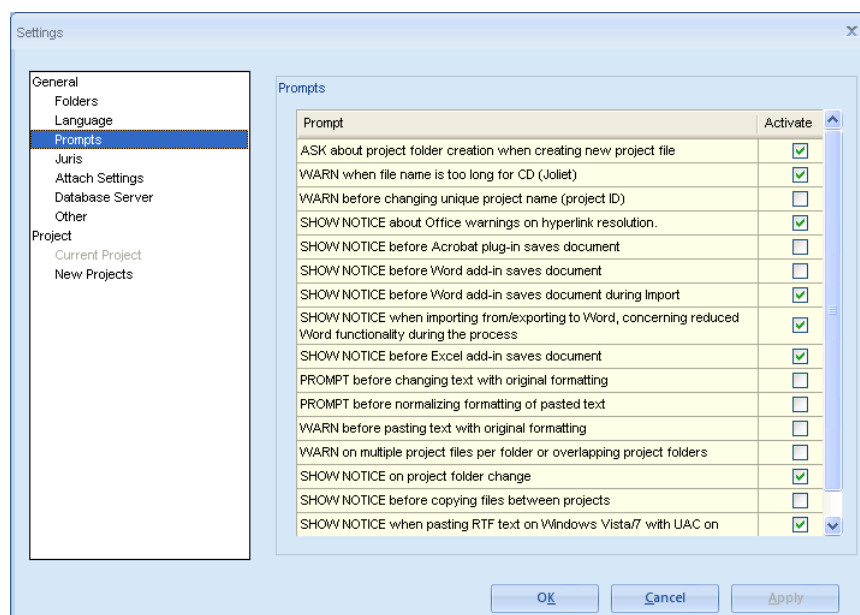
By clicking on **Browse** you can replace the pre-defined export folder with a new folder of your choice. Since the export folder is a temporary folder that is automatically deleted in regular intervals, you can choose how often this should happen. Further information can be found in the chapter Export Folder⁵⁵.

Language



Here the language setting for Normfall Manager can be set. If the option **System default** is activated with a check, Normfall Manager will automatically use the language setting of your operating system. Deactivate this option to change to the German or English user interface.

Prompts



Here you can determine which prompts and warnings should be displayed when working with Normfall Manager:

- **Ask** about project folder creation when creating new project file

When creating a new Normfall project this prompt will ask you whether you would like to automatically create a project folder of the same name for the new project in case there does not exist a project folder yet.

- **Warn** when the file name is too long for CD (Joliet)

If file names contain more than 64 characters this can lead to a loss of references when later burning the project on a CD/DVD because file names are automatically reduced to a maximum of 64 characters when burning. More can be found in the section Maximum Length of File Names^[55].

- **Warn** before changing unique project name (Project ID)

A unique project name (the Project identification number) is a prerequisite for hyperlink functionality. If hyperlinks already exist in a project, they will be lost when changing the project name. More on this can be found in the chapters Hyperlink^[98] and Project Properties^[126].

- **Show notice about Office warnings on hyperlink resolution**

This dialog points to the **Settings for other Applications**^[139] command, by means of which you can deactivate warning messages that are shown when following hyperlinks out of Microsoft Office applications.

Notices when working with plug-ins

When attaching files with plug-ins for Adobe Acrobat, Microsoft Word, Excel and PowerPoint and when creating a new structure out of a Microsoft Word document, a corresponding notice appears before saving. There is also a notice about reduced Word functionality when importing to and exporting text from Word.

The details on plug-ins can be found in the chapter Plug-Ins for Attaching Documents (to a specific target)^[62].

Prompts for formatted text in the editor (text editor)

- **Prompt** before changing text with original formatting

If you try to alter the formatting of a text that was pasted with original formatting a corresponding prompt appears.

- **Prompt** before normalizing formatting of pasted text

If pasting a text into the text editor using the option **Paste with editable formatting**, the original formatting that cannot be edited by the editor will be removed.

- **Warn** before pasting text with original formatting

When trying to paste text with original formatting into the text editor, a corresponding warning will appear because the text may contain some formatting that cannot be edited by the editor.

You can find further information on formatting in the chapter Paste Options in the Detail View^[89].

Prompts on Folder Management

- **Warn** on multiple project files per folder or overlapping project folders^[36]

When creating a new project you should take note to create a **separate folder** for **each individual project** in the file system. When doing so the Normfall project file must always be saved on the first level of the project folder. If Normfall Manager notices that several project files are already in a folder, a corresponding warning appears.

Further information can be found in the chapter Project Folder^[52].

- **Show notice** on project folder change

You will be notified when trying to change the settings for the project folder in the Options Menu.

More information concerning the folder management can be found in the chapter Project Folder^[52].

- **Show notice** before copying files between projects

You will be notified that attached documents from the branch that you would like to copy will be copied to the project folder of the project that you are pasting to.

- **Show notice** when pasting RTF text on Vista with UAC on

You will be notified about the possibility to deactivate the UAC (User Account Control) when having problems with copying and pasting text under Vista.

- **Show notice** when project is opened read-only due to license restrictions

With the versions Basic or Professional it is possible to only edit projects with a maximum of 500 and 1000 entries respectively. If a project exceeds the maximum number of entries, with Basic or Professional it will be opened in read-only mode.

Juris

The screenshot shows the 'Settings' dialog box with the 'Juris' tab selected. The left sidebar lists various settings categories: General, Folders, Language, Prompts, **Juris**, Attach Settings, Database Server, Other, Project, Current Project, and New Projects. The main area of the dialog is titled 'Juris' and contains the following options:

- ☒ Enable references to Juris DBs
- Use this Juris account:
- Account:
- Syntax: MainLogon.SubLogon
- Password:
- ☐ Remember Password
- Automatic login will make use of Internet Explorer and requires non-protected mode.
- It may be necessary to add Jurist to Internet Explorer's list of trusted sites.
- ☐ Use default browser to open linked documents (no automatic log-in).

At the bottom of the dialog are three buttons: OK, Cancel, and Apply.

Provided that you have a user account for the Juris database, you can enter your access information here, which allows you to manage documents from your Juris research directly with Normfall Manager.

To do so activate **Enable references to Juris DBs** and enter your account name and password in the provided boxes. The password can also be saved.

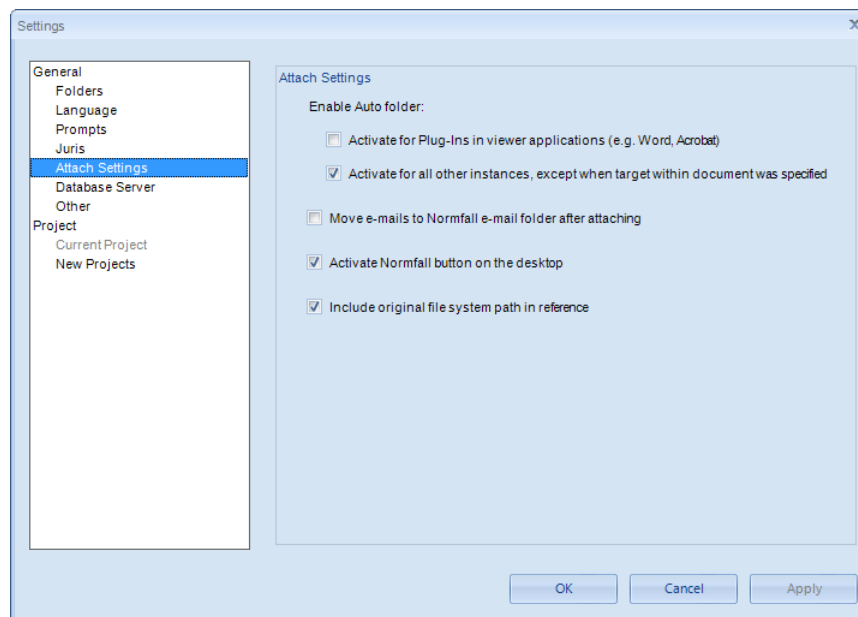
Since Microsoft Internet Explorer is always used to view and attach Juris documents you can activate the option **Use default browser to open linked documents (no automatic log-in)** to display documents with, for example, Mozilla Firefox.

If you do **not** have a Juris account and do not wish to use Juris to research, you can deactivate **Enable references to Juris DBs**; the Juris button will be hidden from the toolbar of the main menu by doing so.

Normfall Manager Administration Kit¹⁴¹ provides more settings for Juris company accounts.



Attach Settings



Enable Auto folder

With this option you can determine in which cases files should automatically be saved in the Auto folder⁵³ during the attaching process.

This option notes a difference between attaching documents by means of the respective plug-ins and the functions available within Normfall Manager.

Activate for Plug-Ins in viewer applications:

This option refers to attachments provoked by means of plug-ins for the applications Microsoft Word, PowerPoint, Excel and Adobe Acrobat.

Activate for all other instances, except when target within document was specified:

This option is set by default and refers to attachments being provoked directly via the functions available in Normfall Manager 4.0 (Attach Box¹³⁷, To Row¹⁵⁴, To Node¹⁵⁴) and by means of Microsoft Internet Explorer, Windows Explorer and Microsoft Outlook, provided that no target within the document (in the attach box) was specified.

*Documents being attached by means of the commands found in Normfall Manager and Windows Explorer will **not be copied** into the auto folder if there already exists an identical document. The existing document will be attached instead.*



Move e-mails to Normfall e-mail folder after attaching

Activating this option will automatically move e-mails that you attach using the Normfall plug-in from your Outlook inbox to a sub folder with the name "Normfall".

Activate Normfall button on the desktop

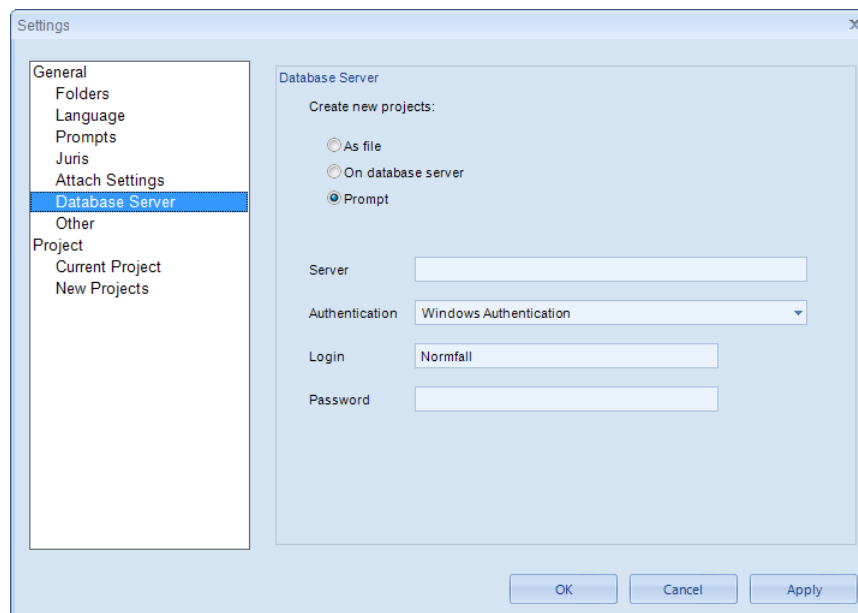
With this option you can set the Normfall button ^[170] to be shown or hidden by default.

Include original file system path in reference

When attaching files from the **file system** Normfall Manager automatically records the original save location of the file. This can be deactivated here. Please note that when using the command **Show Original** ^[135] the original document **can no longer** be displayed in Windows Explorer.

For other systems such as, for example, Juris attachments this option cannot be deactivated.

Database Server



The following settings for working with a database server ^[112] can be changed here:

Create new projects

Here you can define how Normfall Manager should go about creating new projects (using the commands **New Project**, **New from Word Document** or **New from Folder Structure**):

- **As file**

Creates a project file in the file system.

- **On database server**

Creates a new project on a database server.

- **Prompt**

When executing one of the "new" commands from above a prompt will appear, asking you where the new project should be created.

Save log-in information for a database server

Log-in information for a database server can be saved here:

Server: Enter the database server here with which you will be working by default (the standard server).

Authentication: Choose between

- **Windows Authentication**, with which you are always recognized as the user logged on to the computer at the moment and therefore do **not** need to enter a password

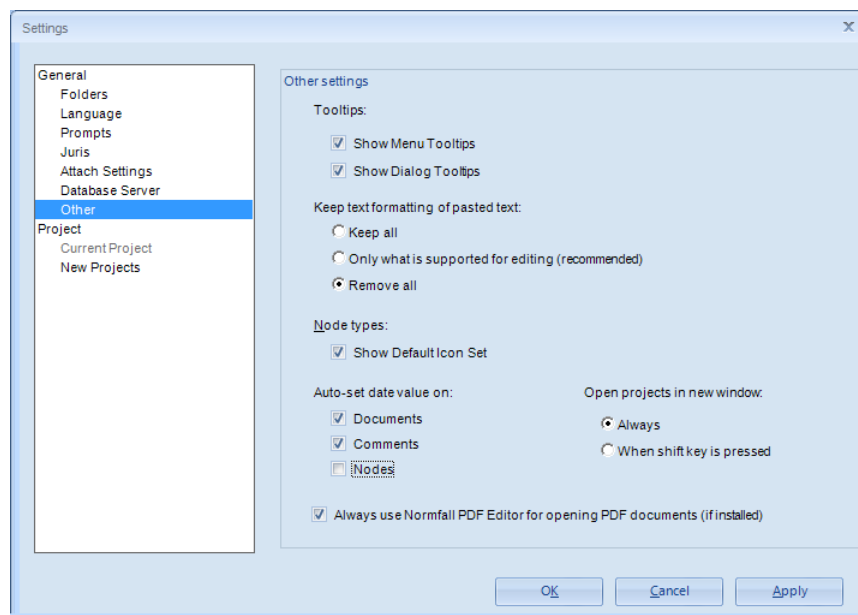
or

- **SQL Server Authentication**, which requires administrator log-in information. This typically consists of "sa" + password.

Depending on the authentication mode, you enter the necessary information into the following fields **Login** and **Password**.

Details on logging-in to a database server can be found in the section Administration of a Database Server¹⁰⁸.

Other



Here the following settings for tooltips and operations of Normfall Manager are possible:

Tooltips

Here you can determine whether **Menu** and **Dialog Tooltips** should be shown. The tooltips contain short help messages on the respective control elements, which is why it is recommended to activate both of these options as long as you are still becoming familiar with the functions of Normfall Manager.

Keep text formatting of pasted text

When pasting formatted text into the text editor you have the possibility of choosing between different formatting settings:

- Keep all
- Only what is supported for editing (recommended)
- Remove all

Further information can be found in the chapter Paste Options in the Detail View^[89].

Node Types

With the option **Show Default Icon Set** you can decide whether Normfall Manager should show its built-in icons for structure node types^[99] by default.

Auto-set date value on:

Here you can determine whether the current date should automatically be set when attaching **Documents** or when creating new **Comments** or structure **Nodes** (not activated by default).

Open projects in new window

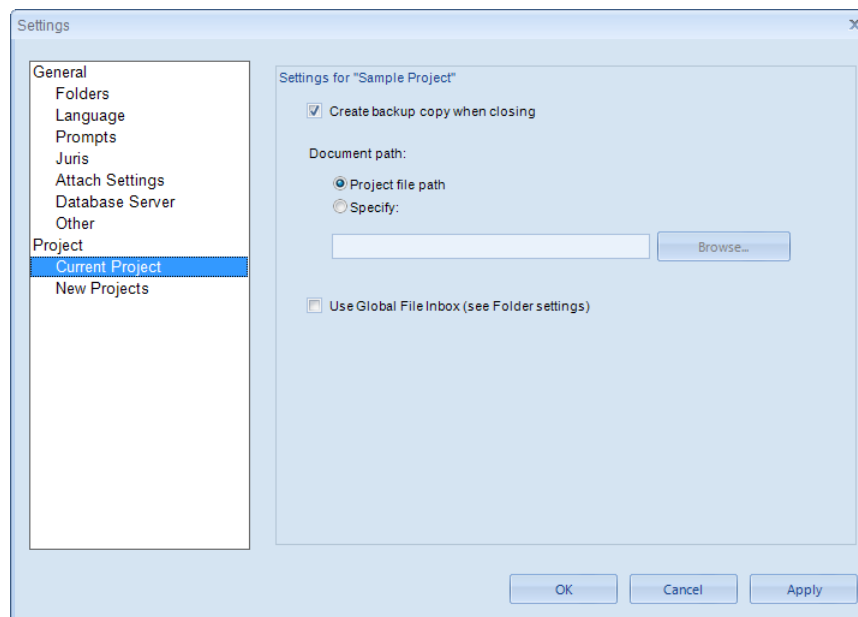
Determine whether a project should **Always** (default setting) be opened in a new window or solely **When the shift key is pressed**.

Always use Normfall PDF Editor for opening PDF documents (if installed)

With this option you can determine that Normfall PDF Editor is always used for opening PDF documents via Normfall Manager (if Normfall PDF Editor is installed on your system).

This option is activated by default. If it is not activated PDF documents will always be opened with the default application for viewing PDF files installed on your system.

Current Project



Create backup copy when closing

When closing an open project Normfall Manager automatically creates a backup copy of the project (see the chapter Backups [107](#)). Here you can deactivate this function as needed by removing the check before **Create backup copy when closing**.

Project file path

Here you can determine whether the project file should be saved in the project folder. This is pre-defined by default. If you would like to **separate** documents and the project file folders, you can do so here. Activate **Specify** and then click on **Browse** to define a new project folder in which all documents will be placed.

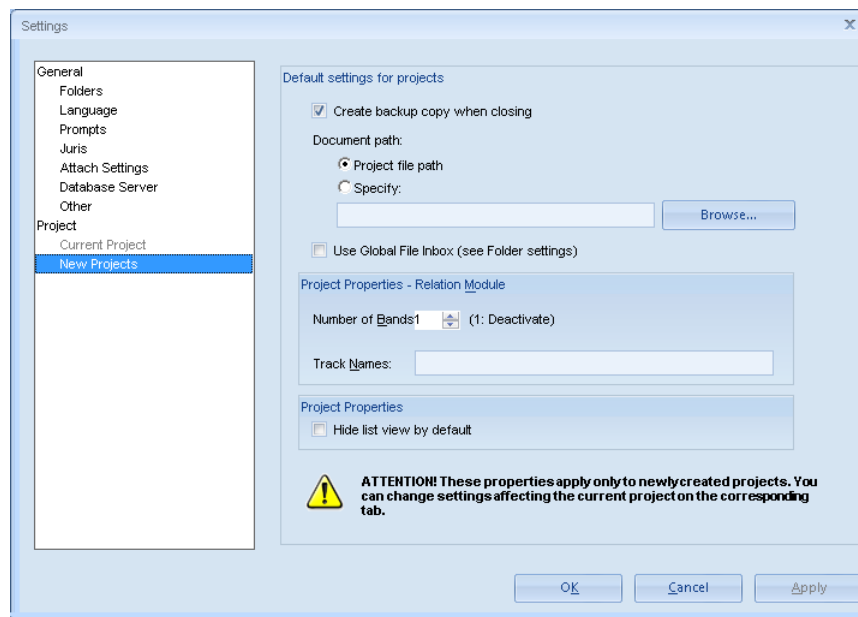
*Note: When working with projects on an SQL Server this option is called **Use Project Properties**.*



Use Global File Inbox (see Folder settings)

If you have entered a global file inbox in the section **Folders**, you must activate **Use Global File Inbox**.

New Projects



Here the same settings can be altered that are found under Current Project¹⁵¹. However, these settings are only valid for future projects to be created.

Project Properties - Relation Module

Here you can determine the number and names of the tracks you want to work with in new projects. More information on the Relation Module is provided here¹¹⁴.

Hide the list view by default

With this option you can determine whether **new projects** should show or hide the list view. See also the chapter Showing and Hiding the List View³⁴.

5.1.6 Functions in the Help Menu

View Help

Using the Help menu, which is marked by the "?" symbol, you can call upon the help function of Normfall Manager and find further information. For more information see the section User Manual¹⁵².

Normfall Manager 4.0 User Manual

To view this user manual in the help window of Normfall Manager, select the command **View Help** from the ? menu. Alternatively, you can call upon the command using the function key **F1**.



To receive information on a particular command¹⁶⁷ or button,

move your mouse cursor over it and press the **F1** key. This will open the corresponding section of the help file in the help window.

In the help window you will find the contents of the user manual. By clicking on the headings you arrive at the corresponding sections, which will be accompanied by explanatory text in the text window to the right.

The small plus sign buttons to the left of the headings show you that there are subsections available under the given heading. These will be displayed by clicking on the plus sign.

Passages written in blue and underlined are so-called hyperlinks (cross references). By clicking on the hyperlink you arrive at the location of the user manual that the hyperlink refers to.

Check for Update

With this command you can find out whether an update is available. Normfall Manager will automatically check our web page for an update appropriated for the version of the software installed on your computer.

You can then download and install the current build without any problems.

License

With this command you open the license wizard of Normfall Manager which supports you to enter license information for your product version. You can find more detailed information in the chapter Activating your License^[24].

Structure License

This function is intended for future versions of Normfall Manager.

Info on Software

Here you can find the following information:

- the version of the software that is installed
- the licensee
- the type of license
- the license key

5.1.7 Special Commands of the Three Views

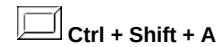
You will not find some commands in the menus^[169] but rather only in the context menus^[167] or on buttons^[166] of the given views and in toolbars. In the following sections an overview of these additional commands will be presented.

Special Functions in the Main Tool Bar

Attach Documents

This command allows you to simultaneously attach several documents by contrast to the [attach box](#)^[137]. For further information, please click [here](#)^[59].

Alternatively, you can execute the command using a key combination, by pressing the keys **Ctrl + Shift + A** at the same time.



To Row

This function allows you to attach a document from the [selection list](#)^[168] directly to the list view. For further information, please click [here](#)^[60].

To Node

This command allows you to attach a file as a structure node to your project. For further information please click [here](#)^[60].

Relationsmodul aktivieren

This command allows you to activate the Relation Module. More information on this topic please click [here](#). [Einrichten des Relationsmoduls](#).



Special Functions in the Structure View

New Root Node

This command can be found in the **context menu** of the structure view. In order to create a new structure node on the first level, open the context menu by right clicking on the white area and select the command **Create New Root Node**. Normfall Manager then inserts a new structure node at the end of your structure.

Paste Special

Structure nodes that you have been cut out or copied can be pasted to your project as [hyperlinks](#)^[98], [shared nodes](#)^[97] or [shortcuts](#)^[97]. Use the corresponding commands in the submenu **Paste Special** of the corresponding **context menu**. Further information on these paste options can be found [here](#)^[93].

Paste Node/Row

To paste a cut out or copied structure node as a subnode to other structure nodes, select the corresponding command from the submenu **Paste Node** of the context menu. Further information on these paste options can be found [here](#)^[94].

Special Functions in the List View

If the tab **Current Node**^[31] is active in the foreground you can use the following commands found in the **context menu**:

Paste Row

With this command you can paste a cut out or copied reference row to the list view of another structure node. Further information can be found in the chapter Paste Options of the List View^[94].

Paste Special

To paste elements as Shared Rows^[97], Shortcuts^[97] or Hyperlinks^[98], select the desired option from the submenu **Paste Special** of the context menu.

Attach

This command is available under the tabs **Recent Docs (Project)** and **Project Folder**.



To attach documents to the currently selected structure node, select them and click on the button in the toolbar.

Alternatively, you can execute this command using the context menu.

Folder Up

With this command found in the Project Folder^[52] tab you can open the subordinated folder. Since you can save your documents as you wish in subfolders of the project folder, you can navigate through the folder hierarchy using this command.

Rename

Under the **Project Folder** tab you will find the **Rename** command with which you can rename files in your project folder without references to the attached documents being lost.

Changing the file name of attached documents in your file system - that is, without using this command in Normfall Manager - will cause the references to no longer function.



Delete File and all References

This command is available under the tabs **Project Folder** and **Document References**. It allows to delete individual documents from your project.



Delete File and all References not only deletes all references to the document, but each subnode and subrow of each reference. This is in particular



relevant if documents have been attached to the structure as structure nodes.

Move File

The **Move File** command is available under the tab **File Inbox** and allows you to move the currently selected document from your file inbox to the project folder^[52] and simultaneously attach this document to the currently selected structure node. In doing so, the document will automatically be moved to the auto folder^[53].

Alternatively, you can execute this command using the context menu.

To attach a copy of the currently selected document from the file inbox to the desired structure node press the **Shift** key while clicking on **Move File**. A copy of the document will then remain in the file inbox.



Moving Files within the Project Folder

The **Move Files** command found under the **Project Folder** tab allows you to move the currently selected documents **within** your project folder^[52], without losing any pre-existing references to the files in the project.

If you move attached documents within your file system - that is, without using the command provided by Normfall Manager - any references to the attachment will be lost!



Delete

This command allows you to remove documents from the **file inbox** or your **project folder**. To do so, click on the respective tab, select the concerned file and click on **Delete** in the toolbar.

Alternatively, you can execute the command using the context menu.



Remove from Recent Docs

The command **Remove from Recent Docs** is available under the tabs **Recent Docs (Projects)** and **Recent Docs (System)** and allows you to delete entries from the corresponding list. The recent docs list is a list of all documents recently used.

Using the context menu you can also execute this command.



Attach Copy

Under the **Recent Docs (System)** tab, you will find the **Attach Copy** command. All documents are listed here that have recently been used on your system - regardless of your work with Normfall Manager.



This procedure will automatically copy the documents to the auto folder^[53].

Alternatively, this command can also be executed using the context menu.

Locate

The **Locate** command is available under the tabs **Document References**, **New Search** and **Shared Content Locations**. Select the desired element from the given list and click on the button in the toolbar to arrive directly at the location in the structure view where the document is attached to.



Remove all

This command is available under the tab **Shared Content Locations** and makes it possible to delete the group of all shared content locations of a file.



Before the deletion process is carried out a dialog box reminds you of all shared content locations and requires you to confirm the command.

Show Shared Content Locations

This function allows you to show a list of all existing shared content locations of a file or a structure node. This command is not accessible by means of a menu, rather only by means of showing the tab **Shared Content Locations** or by double clicking on the corresponding icon in the reference list. For further information, please refer to the section Searching and Finding^[101] under Show Shared Content Locations^[103].



Special Commands of the Detail View

Hide/Show File Info



In the detail view there is a small button with a plus sign on the right border next to the title box. Clicking on it will display additional information about the selected file in the list view (for example, the exact location where the file is saved).

Change to Comment

By clicking on this button it is possible to add annotations to original file/document excerpts. For more details, please refer to the chapter Detail View^[34].

Highlight

Selected text passages from original file excerpts can be highlighted by using this command.

The following list contains the commands of the toolbar of the text

editor that you can use for the direct formatting^[89] of the text of your comments. To make **global** formatting changes select Editor Formatting Options^[140] from the **Tools** menu. More on this subject can be found in the chapter Text Editing^[88].

Undo

Undo alterations made to text.

See the chapter Undo (Text)^[129] from the section Functions in the Edit Menu^[129].

Redo

Redo alterations that you have made to the text.

See the chapter Redo (Text)^[130] from the section Functions in the Edit Menu^[129].

Font Type

Here you can choose between different types of font such as Times New Roman, Arial Narrow or Courier New.

Font Size

Here you can change the size of individual areas of the text, for example Size 4, **Size 5**.

Bold

Format the selected text as **bold**.

Italic

Format the selected text as *italic*.

Underline

Format the selected text as by underlining it.

Font Color

Format the selected text in a given color.

Background Color

Format the selected text with a **background color**.

Justify Left

Format the text so that the beginning of each line begins uniformly on the left side of the text editor and ends freely on the right side.



Justify Center

Format the text so that it is centered exactly in the middle of the editor.

Justify Right

Format the text so that the end of each line ends uniformly on the right side of the text editor and begins freely on the left side.

Justify Full

Format the text so that lines are uniformly formatted at the beginning and the end of the each line.

Numbered List

Number selected paragraphs consecutively and indent them or create a numbered list while entering text.

Bullet List

Places a list symbol in front of the selected paragraphs or creates a list without numbers while entering text.

Increase Indent

Indents the paragraph or selected text to the right.

The indent of this sentence has been increased.

Decrease Indent

Reduces the size of the indent of text that has already been indented.

Insert Hyperlink

Opens a dialog box that makes it possible to add different types of hyperlinks, e.g. http, ftp, etc.

Show Html Source Code

Shows the html source code of the text in the text editor.

Remove Formatting

Removes all formatting of the selected text.

Zoom In

Increases the displayed size of the comment text.

For more on this topic see the chapter Text Editing ⁸⁹.

Zoom Out

Decreases the displayed size of the comment text.

For more on this topic see the chapter Text Editing ⁸⁹.



Paste with original formatting

Pastes the text from the clipboard with original formatting. Please see the chapter Paste Options of the Text Editor ⁸⁹.

Paste with editable formatting

Pastes the text from the clipboard with editable formatting. For more information please see the chapter Paste Options of the Text Editor ⁸⁹.

Paste as plain text

Pastes the text from the clipboard as unformatted text. Please see the chapter Paste Options of the Text Editor ⁸⁹.

5.1.8 Navigation

You can move through the views and structure of Normfall Manager using the mouse or keyboard.

To navigate through the views of Normfall Manager or to activate a tab without the mouse, press the key combination **Ctrl + F6** to activate the so-called keyboard focus ¹⁷⁵.



Ctrl + F6

The contents of each tab can be shown by pressing the key combination **Control key + Tabulator key** or by clicking on the tab with the mouse.



Ctrl + Tab

Within the lists you can either click on the individual rows or alternatively, you can navigate up and down using the arrow keys. To do so, you must have already selected a row so that the keyboard focus is on it.



Arrow key upwards/
downwards

History Back, History Forward

When navigating through your structure or the reference list, Normfall Manager keeps track of the order in which you select nodes or rows. Click on the commands **History Back** and **History Forward** in the **Edit** menu to page through your history one move backwards or forwards.

Alternatively, you can click on the corresponding button in the toolbar or use key combinations.



History Back



History Forward



Alt + left



Alt + right

Navigation with Hyperlinks

Structure nodes and rows can be added as hyperlinks within the project and are therefore another means of navigation. Further

information can be found in the section [Hyperlink](#)^[98]. In the structure and list views, hyperlinks that have been added are depicted with the following icon:



To arrive at the target of the link, simply double click on the icon; in the list view you can also use the command **View Attached Document** found in the context menu.

Hyperlinks pasted to the text editor that link to structure nodes or rows will be underlined and colored blue.

[Hyperlink](#)

Locate



The command **Locate** is available under the tabs **Document**, **References**, **New Search** as well as **Shared Content Locations**. Select the desired element in the corresponding list and click on the button in the toolbar in order to directly arrive at the location where the document is attached to in the structure view.

5.2 Key Combination Tables

In the following chapters you will find a compilation of all possible key combinations that you can use when working with the keyboard^[173] in Normfall Manager.

5.2.1 General Key Combinations

Ctrl + n ^[49]	Create new project
Ctrl + o ^[124]	Open an existing project
Ctrl + s ^[132] Ctrl + Shift + s ^[132]	Search in project Search in selected branch(es)
Ctrl + f	Search in text editor
Alt + F3 ^[126]	Show the Project Properties
F1 ^[152]	Open the Help menu
F3 ^[141]	Open the submenu Options from the Tools menu
Ctrl + F3 ^[140]	Open the submenu Editor Formatting Options in the Tools menu
F5 ^[125]	Update the structure view according to changes made to the structure
Ctrl + F6 ^[174]	Keyboard focus:

	In order to move through the views of Normfall Manager without a mouse, press this key combination.
Ctrl + Tab	Press this key combination to navigate between the individual tabs.
Alt + left 	A step backwards in the navigation history
Alt + right 	A step forwards in the navigation history
Ctrl + z 	Undo changes made to the text
Ctrl + y 	Repeat changes made to the text
Ctrl + Shift + z 	Undo changes made to a project
Ctrl + Shift + y 	Repeat changes made to a project
Ctrl + w 	Invoke View menu
Ctrl + u 	Show User List
Ctrl + Shift + Alt + p 	Set/Change password
Ctrl + Shift + Alt + a 	Open Attach Box
Ctrl + Shift + F12 	Save as
Ctrl + Shift + a  Shift + F12	Attach the currently selected document to the selected structure node
Alt F10	Invoke Main Menu (for keyboard control)
F12 	Connect to SQL Server

5.2.2 Key Combinations in the Structure View

Ctrl + x 	Cut structure node
Ctrl + c 	Copy structure node
Ctrl + v 	Paste structure node on the same level
Ctrl + a 	Select all structure nodes on the same level
Ctrl + m 	Paste structure node as a shared content location

Ctrl + b 	Paste structure node as a shortcut
Ctrl + q 	Paste structure node as a hyperlink
Ctrl + Shift + d 	Convert to document
F2 	Rename structure node
Ctrl + Shift + v 	Paste structure node as subnode
Ctrl + Shift + m 	Paste shared content location as a subnode
Ctrl + Shift + b 	Paste shortcut as a subnode
Ctrl + Shift + q 	Paste hyperlink as a subnode
Ctrl + Shift + F12 	Save as
Shift + F4 	Show Shortcut Target
F7  Ctrl + up	Move the selected structure node up one position
F8  Ctrl + down	Move the selected structure node down one position
Ctrl + I 	Sort all nodes of the same level in ascending order.
Ctrl + Shift + I 	Sort all nodes of the same level in descending order.
Shift + Del 	Delete structure node
Ctrl + right 	Convert the selected structure node to a row
F9 	Create a new structure node
Ctrl + F9 	Create a new subnode
Enter 	Open the selected document

5.2.3 Key Combinations in the List View

Ctrl + x 	Cut row
Ctrl + c 	Copy row
Ctrl + v 	Paste row

Ctrl + a 	Select all
Del 	Delete row
Ctrl + m 	Paste row as a shared content location
Ctrl + b 	Paste row as a shortcut
Ctrl + e 	Export document(s)
Ctrl + Shift + e 	Compress document(s) (create ZIP folder)
Ctrl + t 	Show the "Send To" menu
Ctrl + l 	Show/hide list view
Ctrl + w 	Open View menu
Ctrl + j	Show the Relation tab
F2 	Rename row
F4 	Show document
F6 	Open Windows Explorer
Ctrl + r 	Show temporarily the Shared Content Locations tab
Ctrl + h 	Show temporarily the Recent Docs (Project) tab
Ctrl + Shift + h 	Show temporarily the Recent Docs (System) tab
Ctrl + Shift + F6 	Show the Document References tab
Ctrl + tab	Switch tabs
Shift + F6 	Show Original
F11 	Create New Annotation
Ctrl + F12 	Attach reference
Ctrl + left 	Convert reference row to structure node
In Search lists (lists under the tabs New Search , Manage Document , Show Shared Content Locations) Ctrl + left 	Locate

In File List (lists under the tabs Project Folder , File Inbox , Recent Docs (Project) and Recent Docs (System)) Ctrl + left 	Attach the currently selected document in the list to the selected structure node
In File List (under the tab File Inbox) Ctrl + Shift + left	Attach a copy of the currently selected document in the list to the selected structure node
In File List (lists under the tabs Project Folder , File Inbox , Recent Docs (Project) and Recent Docs (System)) Ctrl + Alt + left 	Open the Attach Box in the file list
Enter 	Open the current document

5.2.4 Key Combinations in the Detail View

Ctrl + c	Copy selected text
Ctrl + x	Cut the selected text
Ctrl + v	Paste the copied/cut text Tip: The formatting of the pasted text can be determined under Tools Options Other .
Ctrl + f 	Find in text
Ctrl + Shift + p 	Print current comment text
Ctrl + p	Print current document
Ctrl + "+/-" 	Zoom in/out (Enlarge/Reduce view)
Ctrl + Shift + Alt + h	Show html source code

5.2.5 Combinations for Keyboard and Mouse Actions

For Drag & Drop actions:	
Ctrl 	Copy the “pulled” element
Shift 	Create a shared content location of the “pulled” element
Ctrl + Shift 	Create a shortcut of the “pulled” element
Ctrl + Shift + Alt 	Create a hyperlink of the “pulled” element

Other combinations:	
Shift + Open Project ^[124]	When project loaded, open another project in a new application window.
Shift + Double click on attached file	Change between primary function (e. g. "Open") and secondary function (e. g. "Open Original")

5.3 The Basics of Use

Here we will explain the terms that are important for an understanding of the other chapters found in this user manual.

So far as these explain commands, we recommend trying the corresponding functions out in Normfall Manager.

5.3.1 Elements of the User Interface

For an explanation of each concept see the following chapters.

Button

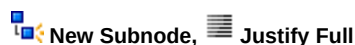
A button consists of an icon ("picture", "symbol") or text and represents a command^[167]. By clicking on the button the command will be executed. For example, by clicking on the **New Subnode** button, a new subnode will be created in the structure view.

You can find buttons in the toolbars^[172] of all three views^[29] as well as in all dialog boxes^[168].

In order to make use of buttons in dialog boxes using the keyboard, move the keyboard focus^[175] using the **Tab** key to the desired button and then press the space bar to execute the command.

If among many buttons one is highlighted, the highlighted button can be activated by pressing the **Enter** key without having to move the keyboard focus previously onto the button.

Examples of buttons:



Check Box

A check box is a box in which yes/no questions (options) are answered. By marking the square box in front of the given option, you affirm the option. With each mouse click on the box you can toggle between the states of **marked** and **unmarked**.

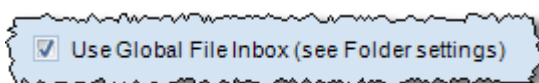


Fig.: The check box for (de)activating the option "Use Global File Inbox"

When the keyboard focus^[175] is on the check box, you can change your selection with the **space bar**.

Command

A Command is an instruction to execute a given function.

Most commands are accessible using the main menu^[169] and its submenus. For example, if the command **Mail Recipient** (used to send documents by e-mail) is found in the **Send to** submenu of the **List** menu, the command will be shortened to **Links | Send to | Mail Recipient** in the user manual.

Many commands can also be activated using key combinations^[174].

Context Command Bar

A context command bar is a special toolbar^[172] that contains certain commands^[167] dependent upon which element is currently active.



Fig. 1: The context command bar of the tab "Structure Node"

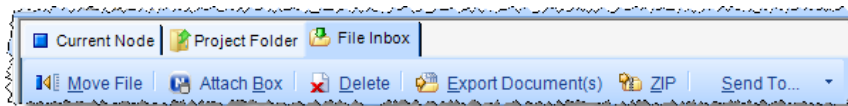


Fig. 2: The context command bar of the tab "File Inbox"

Context Menu

A context menu is a menu^[169] that you can open on certain areas of the user interface by right clicking^[174]. Depending on the previous action and where the context menu is being called up (e.g. at a structure node, row, or in the text editor of the detail view), different context-dependent commands are made available.

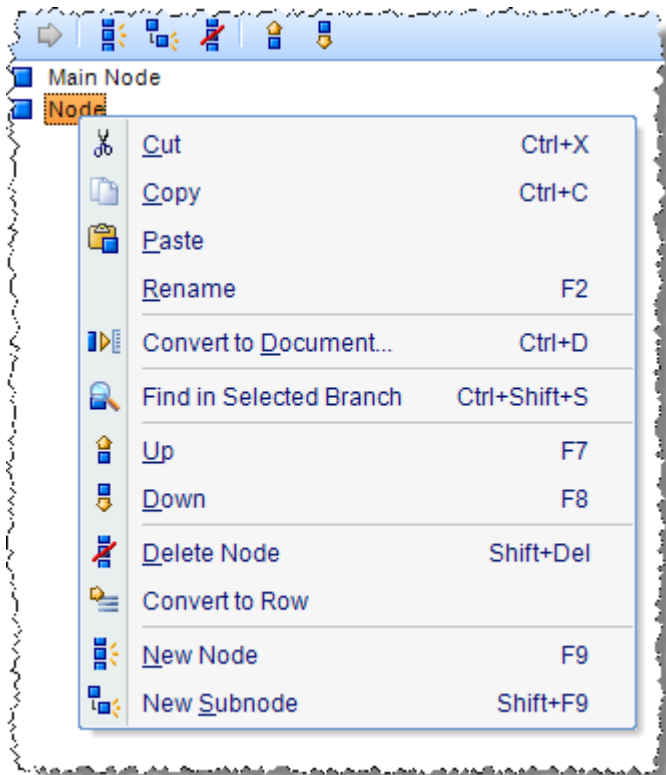


Fig.: A context menu that is called by right clicking on a structure node

Dialog Box

A dialog box is a window that appears in certain situations to request inputs or confirmations from the user. When installing Normfall Manager, for example, a first dialog box appears with the setup wizard for Normfall Manager, which guides you through the installation process. Other examples of dialog boxes are inquiries about the confirmation of certain commands (e.g. deletions) or the window used to set the default font, which can be called upon in the **Tools** menu.

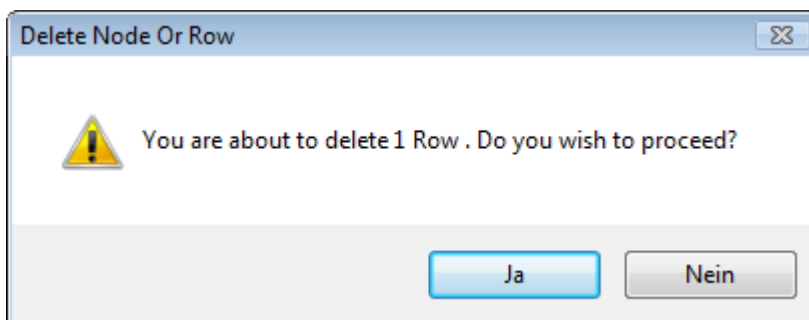


Fig.: A dialog box with a confirmation request for a deletion

Drop-down List

A drop-down list is a list, from which an entry can be selected. They are found either in a list box or a combo box (the latter is a combination of a text box^[172] and a list box).

The list can be expanded by clicking on the button on the right side with the small arrow symbol.

You can select an element from the list by clicking on it.

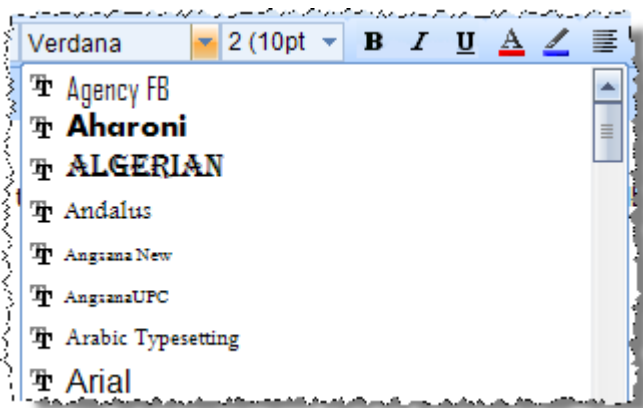


Fig.: A drop-down list with fonts for texts in the comment editor

As soon as your keyboard focus^[175] is placed on the list, you can switch between the entries using the navigation keys on your keyboard and select an entry with the return key without having to expand the list.

Provided that the key combination **Alt-down** isn't being used for any other function, you can use this key combination to expand the list.

Icon

An icon (also: "symbol") is a small picture that represents, for example, applications, file types or commands^[167] in toolbars^[172].



Fig.: Icons for the commands "View Document" and "Attach Box"

Menu

A menu is a list of commands^[167], switches^[172] and submenus that are usually represented by a button^[166].

The most important menus can be found in the menu bar^[169], that is, they can be called upon as context menus^[167] by clicking the right mouse button. The menus can be expanded by clicking the mouse button.

You can navigate through the menu with the navigation keys on the keyboard and select an entry with the **Enter** key.

Menu Bar (Main Menu)

In Normfall Manager six menus^[169] are available in the menu bar, which can be found directly below the window title bar: **File**, **Edit**, **Structure**, **List**, **Tools** and the **Help** menu (marked by a "?"). This menu bar is also known as the main menu.

You can open the menu by either clicking on its name or using a key combination consisting of the **Alt** key and the underlined letter found in the name of the given menu.



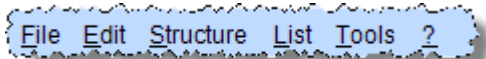


Fig.: The Normfall Manager menu bar

You can also move through menus using the navigation keys of the keyboard and select an entry using the Enter key.

Normfall Button

The Normfall Button is an interface outside the application window on your desktop which allows you to attach a document in a Normfall structure.



Fig. 1: The Normfall button in the Windows taskbar

You find the Normfall Button in the Windows taskbar or in the hover mode over the desktop - the context menu allows for switching between the two states.



Fig. 2: The Normfall button in hover mode

For further information about the Normfall Button please refer to the chapter The Normfall Button in section User Guide.

Radio Button

A radio button is a field in which you can answer "either/or questions". The radio button can take on two states: marked or unmarked.

In contrast to a check box, only one of several radio buttons in a group can be marked. This way you can make a selection out of several options.

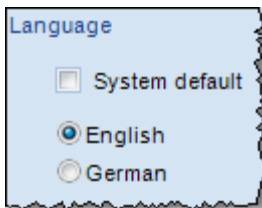


Fig.: A radio button used to select the system language with two possible settings: either English or German

If the keyboard focus^[175] is on the option group, you can select a radio button with the navigation buttons of the keyboard and change its state using the space bar.

Row Selection Box

The row selection box is the rectangular area on the left edge of the currently selected row in the list view.



It is mainly used to select several rows simultaneously (by clicking with the mouse while pressing and holding the **Ctrl** or **Shift** key) or to pull^[174] selected rows with the mouse.

This is necessary because clicking on the content area of the row sometimes calls a different function, that is the processing of the content.

Scroll Bar

A scroll bar is a bar with which you can show information that doesn't fit into one of the three views of Normfall Manager. As soon as this is the case, a horizontal or vertical scroll bar will become visible. You can move it with a touch pad, mouse wheel, the arrows on the end of the beam or by pulling ¹⁷⁴ the position marker.

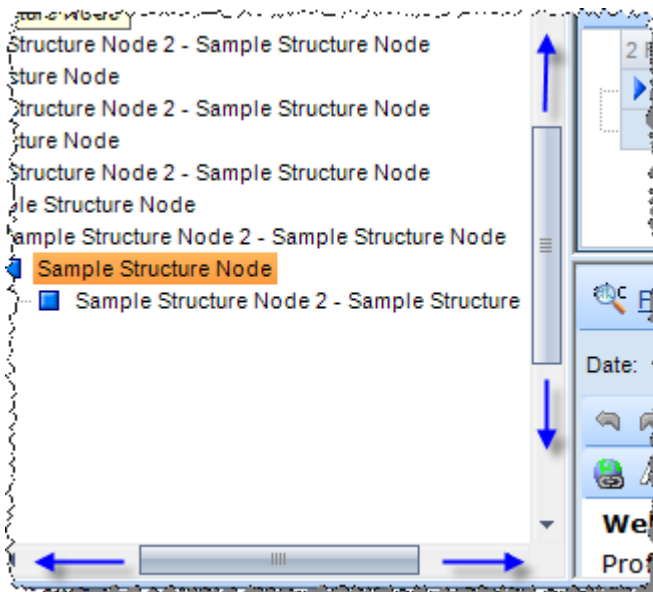


Fig.: Horizontal and vertical scroll bars in the structure view

Separator

A relocatable separator is a horizontal or vertical line that separates one of the three Normfall Manager windows from another.

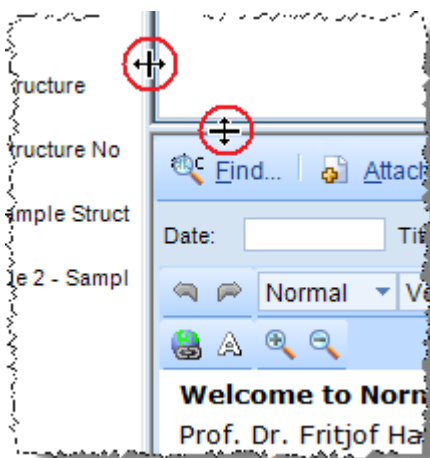


Fig.: Separators between the three windows of Normfall Manager

When the mouse pointer is above a relocatable separator, it

changes into a beam with two arrows. Now you can "grab" the beam and pull^[174] it to another position by means of the mouse.

Switch

A switch serves to activate or deactivate an application mode, thus, for example, the purpose of showing and hiding a specific view.

Switches appear in menus^[169] (e.g. the **View** menu).

Tab

A tab is a group of elements^[166], which are pulled into the foreground (that is, it is shown on the screen) when you click on the tab. A tab is generally found within a group of other tabs, in which only one tab is in the foreground at a time.

Using the menu **List | View** in the menu bar (main menu) you can show and hide the following tabs in the list view next to the tab **Current Node**, which is shown by default: **Project Folder**, **File Inbox**, **Recent Docs (Project)**, **Recent Docs (System)**, **Shared Content Locations** as well as **Document**.

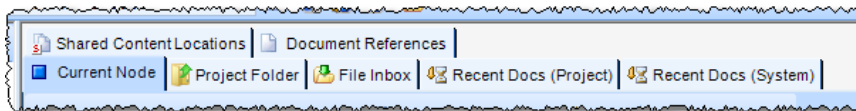


Fig.: Tabs in the list view

Executing a search within the project will open the **New Search** tab.

Text Box

A text box is a field in which you can enter or change text. An example of a text box is the title box in the detail view.

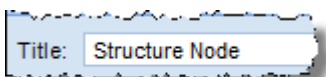


Fig.: An example of the text box "Title" in the detail view

Toolbar

A Toolbar is a panel on which buttons^[166] and other elements^[166] are arranged.

The buttons are often indicated as icons^[169] only, in order to save space - the text will be shown when you move your mouse pointer onto the button.

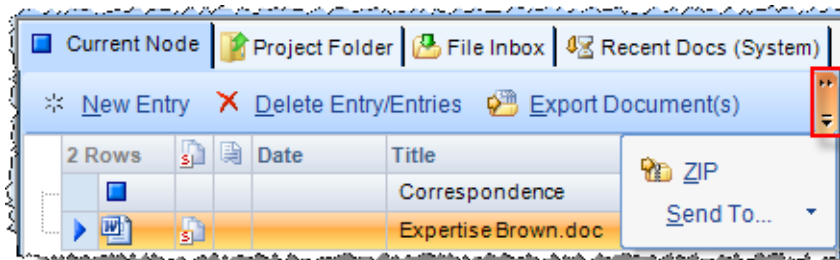
The purpose of the toolbar is to provide you with quick access to frequently required commands.



Fig.: The main toolbar of the program interface

When minimizing the application window or the three views of Normfall Manager (for example, by pulling the separators^[171]) the

toolbars and menu bars are shown incompletely. Instead of that on the right side of the concerning bar a button is shown by means of which you can call up the hidden functions and commands.



Tree Structure

A tree structure is a representation of a hierarchically organized structure. On the left side of Windows Explorer, for example, there is a tree structure of all file folders on the system.

In Normfall Manager tree structures can be found, for example, as a representation of your Normfall structure, in the **Tools** | **Options** menu as well as in the attach box ⁷⁵.

Window Title Bar

The window title bar is the bar at the top of the application window. On the left side it shows the application icon, the name of the Normfall project that is currently open (provided that one is open), the name of the application ("Normfall Manager 4.0") as well as the type of license (e.g. "Enterprise"). On the right side of the window title bar are the common commands for minimizing, maximizing and closing the application window.

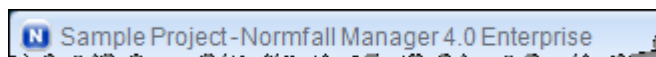
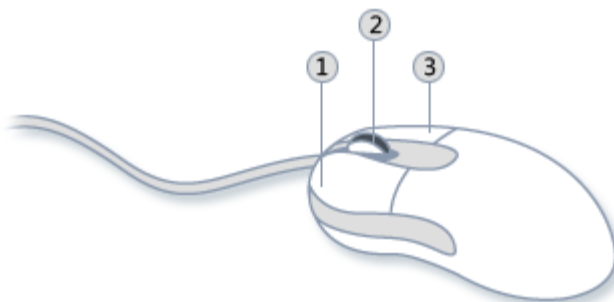


Fig.: The window title bar of Normfall Manager with an open project named "Sample"

5.3.2 Working with the Mouse

Most modern computer mice have a left (1) and right (3) button as well as a scroll wheel (2). Depending on with which button and how often an element is clicked, different functions can be executed.



Clicking and Double-clicking

The terms "clicking" or "double-clicking" will always refer to the

left mouse button. By single-clicking, that is, by simply clicking and releasing the mouse button once, certain elements can be, for example, marked or certain commands can be executed, as soon as the required button^[166] is clicked.

By **double-clicking** files can be opened.

Right-clicking

A click with the **right** mouse button (also called a "right-click") on an element or work surface opens a menu with further commands and options known as the so-called context menu^[167]. The functions available here can then be selected with a simple click (with the left mouse button).

Pulling

In order to "pull" an element, first click on it and while holding the mouse button, pull the mouse to the desired position and release the mouse button. In this manner files can be moved from one folder into another in Windows Explorer. This functionality is also known as drag & drop.

By means of this function you can, for example, move structure nodes or also attach files.

Further information can be found here^[90].

5.3.3 Working with the Keyboard

Like most modern applications, Normfall Manager is optimized for the use with the mouse. However, frequently occurring activities can be accelerated by learning how to use the keyboard to carry out these tasks.

Key Combinations

Most commands^[167] are not only available in a menu^[172] or toolbar^[172] but can also be executed by using a key combination.

A key combination consists of a certain key (called the command key herein) and one or more modifier keys (see below). An example: **Alt + F4** to close the application window. **Alt** is the modifier key and **F4** the command key. To execute a key combination you press and hold all given modifier keys while pressing the command key as usual.

Also a single function key (without modifier keys) falls in the category of key combinations.

An overview of key combinations^[161] can be found by following the link.

Modifier Keys

A modifier key is a key on the keyboard that (with exceptions) does not have its own function, but has to be pressed in conjunction with another key to execute a key combination.

The most important modifier keys are (the description is valid for the normal layout of an office keyboard, but not necessarily for laptops) as follows:

Ctrl (Control) - can be found in the far left as well as the far right corner on the bottom row of the keyboard.

Alt - can be found on the left and right sides of the space bar (the large key at the bottom). Its special feature: The **Alt** key activates the main menu if no command key is pressed before releasing.

Shift - this key is the key used to enter capital letters. It is generally characterized by an up-pointing arrow.

Keyboard focus

If an element^[166] is activated, it usually has the keyboard focus on it. This means that it is the single element that will react to keyboard input. For example, you click with the mouse on a text box^[172] in order to activate it and to place the text cursor there so that you can enter text.

However, many commands that you can execute using key combinations are global, meaning that they will be executed regardless of which element has the keyboard focus on it.

The concept of keyboard focus essentially means that you first need to click on a position on the screen with the mouse in order to be able to enter input at said position using the keyboard.

If you want to use the keyboard more intensively, you will come to appreciate using the **Tab** key or respectively the key combination **Shift + Tab** to move the keyboard focus from one input box to the next, for example in a dialog box^[168].

Further Important Keys

Enter - the large key on the right side of the keyboard (formerly the "Return" key) with the arrow pointing down and to the left. Its general function is the confirmation of input and activation of the highlighted button^[166] found in dialog boxes^[168].

Tab - the **tabulator key** in the upper left with the two arrows pointing in opposite directions. Its general function is to switch the keyboard focus in dialog boxes^[168].

Space bar - the large key on the bottom of the keyboard used to insert spaces. Its general function is to toggle elements^[166] on and off when the keyboard focus is on them.

Navigation keys - keys used to move the text cursor, a drop-down list^[168] or the keyboard focus. These keys are above all the **arrow keys left, right, up and down**, but also include the **Page Up** and **Page Down** keys for skipping over several elements and the keys **Home** and **End** used to jump to the beginning or end.

Function keys - the number keys indicated by a "F" on the top row of the keyboard.

On special Windows keyboards:

Context menu - this key marked by a symbol for the context menu next to the right **Ctrl** key is used to open a context menu^[167] for the element^[166] that currently has the keyboard focus on it.

5.3.4 The Clipboard

The clipboard of the system allows you to intermediately save virtual objects such as structure nodes^[35] or reference rows^[36] as well as text passages in order to paste them into another position. The basic commands^[167] are:

Copy (Ctrl +C) - creates a copy of the object on the clipboard.

Cut (Ctrl +X) - moves the object to the clipboard, removing it from its former position.

Paste (Ctrl + V) - Inserts a copy of the object found on the clipboard at the desired location.

Using these commands you can, for example, cut out a branch of the structure and "stuff" it back into the structure at another location. Likewise, you can create a copy of the branch.

Using the clipboard you can also exchange objects between different programs. However, because a text editor, for instance, cannot display structures, structure nodes will be represented as text.

The basic commands of the clipboard can also be called on using the Edit menu^[169]; however, it is usually easier to use the corresponding key combinations (see above) or the context menu^[167].

Copying or cutting does not always occur immediately. If you, for example, copy a branch of a structure, at first the program only takes into consideration which structure node you have selected to copy. Only when you execute the paste command the copy will actually be created. This means that changes made to the branch between copying and pasting the branch will not be taken into consideration in the pasted copy.

Which objects can be exchanged between your Normfall project and other programs can be found here^[90].

6

Appendix

6 Appendix

6.1 Troubleshooting - Problems and their Solutions

In this chapter you will find a compilation of known problems that can show up when working with Normfall Manager as well as their removal. These problems are primarily due to program versions and individual settings of the installed programs.

6.1.1 Pasting Text in the Text Editor

In the text editor problems with the paste command can occur due to a certain security setting in Internet Explorer.

In IE6 this setting is as follows:

"Allow Paste Operations Via Script"

In IE7 as follows:

"Allow Programmatic clipboard access"

Until now the following is problematic:

- The setting in IE6 has an effect on the paste function; the setting in IE7 does not.
- In IE6 the setting also takes effect when it is set only for the Internet, although you are currently working strictly with the local harddrive.

The problem can be avoided by switching the security option off. In company networks these settings are usually centrally defined and cannot be altered by users.

6.1.2 Different Acrobat Versions

The Normfall Manager plug-in for Adobe Acrobat⁷³ is only available for the full version of Adobe Acrobat 7.0 and higher. Thus, we recommend purchasing this product for a comfortable attachment process.

If several versions of Acrobat or Adobe Reader are installed on a computer, which of these versions is used for **opening** of documents depends on the type of reference (document, page, comment, text or target). Generally, the **latest installed** version is used.

In case of references of the **Annotation** type - if any - a **full version** (i.e. not the Reader version) is always used to open documents.

If only Adobe Reader is installed on a computer, there will be the following insignificant restriction of functionality when opening references of the **Annotation** type:

Since the Reader supports only the reference types **Page** and **Target**, Normfall Manager also creates in the case of **Annotation** references a **target** in the PDF document indicating zoom factor

and display detail such that the Reader can target it.

However, if **no write access** is available in the moment of the attachment process this option is omitted and the document can be opened only at a specific page in the Reader version (i.e. zoom factor and display detail are not taken in consideration).

6.2 FAQ

6.2.1 Access Conflicts with Several Users

When other users are working on the same data as you, it is possible that the software will warn about access conflicts. In this case the alteration that you just attempted to make will be abruptly brought to an end.

There are two types of access: **content alterations** (made to "items") and **structure alterations** (made to "nodes"). Only content alterations (changes made to text) render an element (structure node or row) inaccessible for a prolonged period of time. The content of inaccessible elements cannot be changed during the period of time that the element is considered inaccessible. You can, however, move the element, since doing so is merely considered a temporary structure alteration and does not come into conflict with content alterations.

Content alterations

That a row is rendered inaccessible by your actions is made clear by the edit icon found on the left side of the row, which appears as soon as you enter text. If you try to enter text although another user is working on the given row a notification will appear and instead of the edit icon the inaccessibility icon is displayed. You can attempt to enter text again at any time - as soon as the row is "free" your entry will be accepted.

If the current row has been edited by another user you will receive a corresponding notification when attempting to enter text and the row will be refreshed. The green refresh icon will appear instead of the edit icon.

So that a row cannot be permanently rendered inaccessible, it will automatically be made accessible after a given period of time (less than a minute) if it is not currently being altered.

Structure alterations

If an access conflict occurs when, for example, moving a structure node, the type of error is a structure alteration conflict. Structure alterations are usually finished within a few seconds so that you can immediately attempt to move the structure node again.

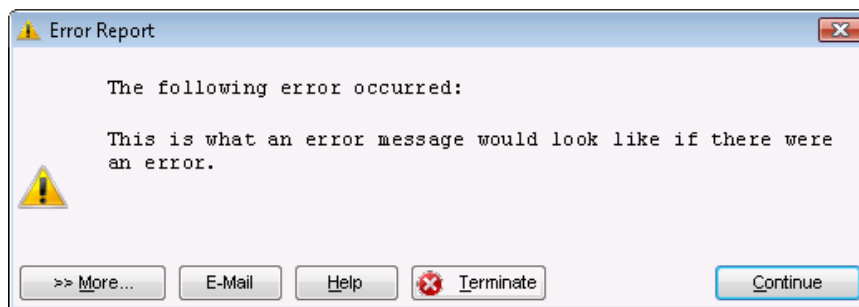
If several users frequently make structure alterations, the probability of such conflicts increases since when a structure node is moved all nodes above the level of the given node are rendered inaccessible to make certain that the given structure

node is not inserted under a structure node that has been moved in the meantime by another user. At the location where the node is to be inserted all nodes at this same level are rendered inaccessible since their positions (distance between the other nodes on this level) are changed.

Alterations to the structure are not immediately visible for all users. They will first see the alterations when these users make an alteration to the structure or use the **Reload Structure View** command found in the **File** menu.

6.2.2 Error Messages

When working with Normfall Manager there might occur errors due to unknown problems. Below you see how an error message would look like:



Click on

More - to show detailed information on the error. If you would like to contact our telephone support hotline in such situation, these details are useful for our support team to get an idea of what kind of error occurred.

E-Mail - to directly send the error report via mail to support@normfall.de.

Help - to get general information on error messages in the corresponding chapter of the online help.

Terminate - to force the immediate abortion of the application (and all running Normfall sessions).

Continue - to continue working with Normfall Manager. Your changes will **not** be lost due to the error.

*By clicking on **Terminate** all currently loaded project files are being closed! This may cause **damages** to the project files.*

With projects on a database server this program termination, in turn, makes it impossible to save changes made to the text editor.

